EXHIBIT 6

Church Handbook of Instructions

Book 1

Stake Presidencies and Bishoprics

Published by
The Church of Jesus Christ of Latter-day Saints
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Introduction

The Lord admonished, "Wherefore, now let every man learn his duty, and to act in the office in which he is appointed, in all diligence" (D&C 107:99; see also D&C 105:10).

Church leaders should seek personal revelation to help them learn and fulfill the duties of their callings.

Studying the scriptures and the teachings of latter-day prophets will also help leaders learn their duties. The Lord has admonished leaders to treasure up in their minds continually the words of God so they will be receptive to the influence of the Spirit (see D&C 84:85).

Leaders also learn their duties by studying the instructions in Church handbooks. These instructions can facilitate revelation if they are used to provide an understanding of principles, policies, and procedures to apply when seeking the guidance of the Spirit.

Introduction to the *Church Handbook of Instructions*

To reduce and simplify information on Church administration, most handbooks and other instructions have been consolidated into the *Church Handbook of Instructions*, which consists of two books:

- *Book 1: Stake Presidencies and Bishoprics.* This book is similar to the former *General Handbook of Instructions.* For the most part it includes information that only stake presidencies and bishoprics need. However, other stake and ward leaders may have access to this information as needed for reference.
- *Book 2: Priesthood and Auxiliary Leaders.* This book provides instructions for administering priesthood quorums and auxiliaries. It also provides instructions on Church programs, activities, leadership, and selected policies. This publication is bound as a single book for stake presidencies, bishoprics, high priests group leaders, elders quorum presidents, and auxiliary presidents. Individual sections are published for leaders who do not need the entire book.

Superseded Publications

As of 1 January 1999, the *Church Handbook of Instructions* supersedes the following publications, which should be discarded:

- *General Handbook of Instructions*
- *1991 Supplement to the 1989 General Handbook of Instructions*
- *Melchizedek Priesthood Leadership Handbook*
- *Aaronic Priesthood Leadership Handbook*
- *Stake Mission Handbook*
- *Temple and Family History Leadership Handbook*
- *Relief Society Handbook*
- *Young Women Leadership Handbook*
- *Primary Handbook*
- *Primary Handbook Supplement*
- *Sunday School Handbook*
- *Activities Committee Handbook*
- *Church Music Handbook*
- *Stake and Ward Clerk Handbook*
- *Public Affairs Handbook*
- *Member Progress Reporting Instructions*
- *Instructions for Priesthood Leaders of Single Members*
- *Instructions for Priesthood Leaders on the Church Educational System*
- *Instructions for Priesthood Leaders on Institutes of Religion*
- *Instructions for Priesthood Leaders on Military Relations*
- *Instructions for Priesthood Leaders on Physical Facilities (United States and Canada)*
- *Instructions for Priesthood and Auxiliary Leaders on Sports and Recreation Activities*
- *Instructions for Priesthood Leaders on Church Magazines*
- *Instructions for Priesthood Leaders and Librarians about Meetinghouse Libraries*
- *Instructions for Priesthood and Auxiliary Leaders on Primary*
- *Instructions for Priesthood and Auxiliary Leaders on Sunday School*
- *Instructions for Priesthood and Auxiliary Leaders on Teacher Development*
- *Gospel Literacy Guidelines for Priesthood and Relief Society Leaders*
- *Helping Unwed Birth Parents: A Guide for Ecclesiastical Leaders*

- *Bulletin* issues preceding 1999 (except the March 1993 *Special Bulletin*)

Although the information in *Providing in the Lord's Way: A Leader's Guide to Welfare* is included in the *Church Handbook of Instructions*, it will continue to be published as a separate document.

Updates and Supplements to Instructions

Occasionally the information in the *Church Handbook of Instructions* will be updated or supplemented through the *Bulletin*, Notices, and other correspondence from the First Presidency, Quorum of the Twelve, and Presiding Bishopric. When this occurs, leaders should write the change in their copies of the handbooks. Leaders should keep handbooks and these supplementary materials together.

Questions about Instructions

Leaders who have questions about information in the *Church Handbook of Instructions*, or about issues that are not addressed, should direct the questions to their immediate presiding authority.

Application in Branches, Districts, and Missions

Unless the context shows otherwise, the terms *bishop* and *bishopric* in the *Church Handbook of Instructions* refer also to branch presidents and branch presidencies. The terms *stake president* and *stake presidency* refer also to district presidents and district presidencies. References to wards and stakes usually apply also to branches, districts, and missions.

Branch, district, and mission presidents should follow these instructions as far as they are applicable. A mission president should have the approval of his Area Presidency if he believes he needs to modify the application of these instructions in his mission.

Distribution of *Book 1*

Book 1: Stake Presidencies and Bishoprics should be distributed as follows:

- General Authorities, Area Authority Seventies, general Church department heads, general auxiliary presidencies, directors for temporal affairs (1 copy each)
- Temple presidency (4 copies)
- Stake presidency (5 copies)
- Bishopric (4 copies)
- Mission presidency (3 copies)
- District presidency (5 copies)
- Branch presidency (3 copies)

Book 1 has been prepared solely for use by general and local Church officers to administer the affairs of the Church. The entire book should not be duplicated. However, the stake president or bishop may authorize portions to be duplicated for high councilors and others as needed.

When Church officers who have a copy of *Book 1* are released, they should give the copy promptly to their successor or to their presiding authority.

List of Items Referenced

The *Church Handbook of Instructions* refers to many other Church-produced materials, such as forms, manuals, and certificates. An alphabetical list of the materials that are referenced in this handbook is provided below. If item numbers have been assigned, they are provided below rather than in the text of this handbook. Most of these materials are available through Church distribution centers.

Aaronic Priesthood Record and Certificate form (35857)

A Guide to Quality Seminary Graduation Exercises (32372)

A Member's Guide to Temple and Family History Work (34697)

Annual Tithing Status Report

A Parent's Guide (31125)

Application to the First Presidency form (35789)

Baptism Record form (35919)

Bishop's Order for Commodities forms (33585 and 31422)

Caring for the Needy videocassette (part of *Essentials of Welfare*, 53045)

Certificate of Appointment (33120)

Child Blessing Record and Certificate form (35856)

Church Educational System Publications Catalog (item number varies by year)

Church Name and Logotype Guidelines for Local Units (35654)

Confidential Report on Proposed Temple Ordinance Workers form (34449)

Confirmation Record/Baptism and Confirmation Certificate form (35920)

Directory of General Authorities and Officers

Endowed from on High: Temple Preparation Seminar Teacher's Manual (35322)

Family Home Evening Resource Book (31106)

For the Strength of Youth (pamphlet 34285; card 34287)

Gospel Principles (31110)

A Guide to Quality Seminary Graduation Exercises (32372)

Identification and Prevention of Suicidal Behavior (32253)

Identification tag for LDS military members (33118)

Information and Suggestions for Patriarchs (31257)

Instructions for Clothing the Dead Who Have Received Their Endowments (31461)

Instructions for Making Temple Clothing (31460)

LDS identification tag (for members in the military; 33118)

Limited-Use Recommend (32602)

Meetinghouse Artwork Brochure (34826)

Melchizedek Priesthood Record and Certificate form (35858)

Member Progress Report—Stake/District (34903)

Member Progress Report—Ward/Branch (34902)

A Member's Guide to Temple and Family History Work (34697)

Military scripture set (31197)

Missionary Recommendation forms packet (31957)
- Missionary Health-Dental Record
- Missionary Personal Insurance Information form
- Missionary Recommendation form
- Missionary Resumé for Couples and Single Women

Missionary Tuberculosis Screening Report form (31966)

Needs and Resources Analysis form (32290)

New Patriarch Recommendation form (31674)

Officers Sustained (Branch in Mission) form (32303)

Officers Sustained (District) form (32301)

Officers Sustained (Stake) form (32300)

Officers Sustained (Ward/Branch in Stake) form (32302)

A Parent's Guide (31125)

Patriarchal Blessing Recommend (32017)

Performance Contract form (33811)

Personal Progress book (31491)

Preventing and Responding to Child Abuse (35665)

Preventing and Responding to Spouse Abuse (35869)

Providing in the Lord's Way: A Leader's Guide to Welfare (32296)

Recommendation for New Bishop form (31747)

Recommendation for New Counselor to Stake President form (31746)

Recommendation for Part-Time Church-Service Missionary form (35813)

Recommend for Living Ordinances (32601)

Recommend to Perform an Ordinance form (32595)

Report of Administrative Action form (32427)

Report of Church Disciplinary Action form (33493)

Request for Contact form (32387)

Request for Ordinance Information form (32388)

Request for Supplemental Financial Assistance for Full-time Missionary form (31964)

Responding to Abuse: Helps for Ecclesiastical Leaders (32248)

Scouting Handbook (United States 35814; Canada 35810)

Special Bulletin (March 1993; 35050)

Stake and District Historical Summary (32299)

Stake/District Audit of Membership Records form (35584)

Stake/District Organization Application form (34203)

Teaching—No Greater Call (33043)

Temple Media Kit (32507)

Temple Recommend (32600)

Temple recommend binder (*Recommends to Enter the Temple*; 32599)

Tithing and Other Offerings form (31592)

Understanding and Helping Those Who Have Homosexual Problems: Suggestions for Ecclesiastical Leaders (32250)

Ward/Branch Organization Application form (34202)

4. Interviews and Counseling

Interviews

Each stake president and bishop is "a judge in Israel" (D&C 107:72). By this authority they conduct worthiness interviews and priesthood interviews as outlined in this section. They represent the Lord in conducting these interviews. Accordingly, they should seek to bless members and help them live the gospel of Jesus Christ.

General Instructions for Worthiness Interviews

Stake presidents, bishops, and (when authorized) their counselors conduct worthiness interviews as outlined in this section. They should prepare spiritually so they can be guided by the Spirit during these interviews. They also should seek the power of discernment. This is a spiritual gift that will help them discern truth, as well as a member's needs (see D&C 46:27–28).

Worthiness interviews should be private. For example, a husband and wife are interviewed separately for temple recommends.

Careful listening is important during worthiness interviews. The member of the stake presidency or bishopric should give full and sincere attention to the person being interviewed. The interviewer also makes sure that members understand the questions being asked. He sets aside enough time to conduct the interview in a dignified, unhurried manner.

General Instructions for Priesthood Interviews

Stake presidents, bishops, and their counselors regularly interview the priesthood leaders who report to them. One purpose of these interviews is to receive an accounting of the leader's responsibilities. Another purpose is to help the leader review progress, set goals, and make plans to accomplish them. Where applicable, budgets and expenditures are also reviewed during these interviews.

The person who conducts a priesthood interview should instruct, encourage, and inspire leaders in their efforts to fulfill their callings. He also should express gratitude and strengthen the leader in his personal and family life.

Interviews Conducted by the Stake President

The stake president conducts the following interviews with stake members:

1. For temple recommends (see pages 65–68).
2. For callings and releases as full-time missionaries (see pages 81, 87).
3. For callings to serve as counselors in the stake presidency, as patriarchs, and as bishops, when authorized (see pages 37–38).
4. For callings to serve as stake mission president, elders quorum presidents, and stake auxiliary presidents.

The stake president also holds a monthly priesthood interview with each bishop. He holds at least a semiannual priesthood interview with each patriarch (see page 6).

Interviews Conducted by the Stake President or His Counselors

The stake president or an assigned counselor conducts the following interviews with stake members. Before interviewing a person for any of the purposes listed below, the member of the stake presidency ensures that the person has been interviewed or cleared by the bishop. If a counselor encounters serious matters, such as transgressions that require confession, he should refer the member to the stake president without delay.

1. For temple recommends (see pages 65–68).
2. For ordination to the offices of elder or high priest (see pages 31–32).
3. For callings to serve in Church positions (see pages 37–49).
4. For an endorsement to enroll at a Church university or college (see page 117).

Members of the stake presidency also hold regular priesthood interviews with each elders quorum president and high priests group leader in the stake.

Interviews Conducted by the Bishop

The bishop conducts the following interviews with ward members:

1. For temple recommends (see pages 65–68).
2. For callings as full-time missionaries (see page 81).
3. For ordination to the offices of elder or high priest when authorized by the stake presidency (see pages 31–32).
4. For annual tithing settlement (see page 134).

5. For callings to serve as ward auxiliary presidents.
6. For baptism of eight-year-old children who are members of record (see page 26).
7. For 12-year-old children as they advance from Primary. (At the same time he interviews the boys to determine whether they are worthy and prepared to receive the Aaronic Priesthood. He interviews the girls in preparation for entering the Young Women program.)
8. For ordination to the offices of deacon, teacher, and priest.
9. For callings to serve as deacons or teachers quorum presidents and as his assistants in the priests quorum.
10. Annual interviews of all youth and semiannual interviews of priests and 16- and 17-year-old young women (see "Guidelines for Youth Interviews" on this page).
11. For an endorsement to enroll or continue attendance at a Church university or college (see page 117).
12. For patriarchal blessings (see pages 34–35).

At least quarterly the bishop also holds priesthood interviews with the elders quorum president and high priests group leader.

Interviews Conducted by the Bishop or His Counselors

The bishop or an assigned counselor conducts the following interviews with ward members. Only the bishop resolves concerns about chastity and associated moral matters in these interviews. If a counselor encounters serious matters, such as transgressions that require confession, he should refer the member to the bishop without delay.

1. For temple recommends (see pages 65–68).
2. For callings to serve in the ward, including counselors and secretaries in Aaronic Priesthood quorums and presidents, counselors, and secretaries of Young Women classes (see pages 37–49).
3. For youth (see "Guidelines for Youth Interviews" on this page).
4. For young single adults, single adults, and students (usually annually; however, acting with inspiration and wisdom, the bishopric may adjust the frequency of these interviews).
5. For seminary or institute graduation.
6. For brethren who desire to act as voice in performing an ordinance in another ward but do not have a temple recommend. (If the person is worthy, the bishopric member fills out and signs a Recommend to Perform an Ordinance form.)
7. For members entering military service (see page 119).

Guidelines for Youth Interviews

The bishop interviews each young man and each young woman in the ward at least annually. He interviews each priest and each 16- and 17-year-old young woman at least twice annually.

In addition, six months after the annual interview with the bishop, counselors in the bishopric interview each young man and young woman who belong to the Aaronic Priesthood quorum and Young Women class the bishop has assigned them to oversee.

In large wards, bishops, acting with inspiration and wisdom, may adjust the frequency of interviews. Some youth may need added attention, while others may need less frequent interviews than are suggested, though all should be interviewed at least annually.

Interviews are excellent teaching opportunities and can be spiritual experiences for youth. Members of the bishopric should express love and listen carefully. They should encourage the young person to talk rather than doing most of the talking themselves.

Matters for discussion should include the growth of the young person's testimony of Heavenly Father, the mission and Atonement of Jesus Christ, and the restored gospel. The importance of sustaining the President of the Church and other general and local Church leaders should also be discussed.

Another matter for discussion should be the importance of obeying the commandments, particularly:

1. Praying regularly in private and with the family, studying the scriptures, honoring parents, and paying a full tithing.
2. Being modest in dress and action, refraining from any kind of sexual activity, and refraining from reading, listening to, or viewing pornographic material.
3. Obeying the Word of Wisdom and refraining from using illegal drugs and misusing other substances.
4. Refraining from using the name of the Lord in vain and from using vulgar expressions and other degrading language.

5. Attending priesthood and sacrament meetings, participating in other Church meetings and activities, and fulfilling assignments given by the priesthood quorum or Young Women class presidency.

The bishopric may want to refer to *For the Strength of Youth* during discussions about obeying the commandments.

While interviewing young men, the bishopric member gives special attention to their preparation for a full-time mission. He discusses being worthy, studying the gospel, building a testimony, and preparing financially, emotionally, physically, and spiritually. Bishopric members should be sensitive to the circumstances under which young men are honorably excused from full-time missionary service (see pages 81–82).

The bishop and his counselors encourage young women to support young men in accepting mission calls. Young women of eligible age who desire to serve a mission may do so, but they should understand that it is optional (see page 80).

Members of the bishopric ensure that youth understand the blessings of temple covenants and temple marriage and the requirements for receiving these blessings.

When interviewing a young man for priesthood ordination, the bishop discusses the blessings of holding the Aaronic Priesthood and the duties of the office to which the person will be ordained, as revealed in Doctrine and Covenants 20:46–60 (see also pages 175–76 in *Book* 2). In all interviews with young men, the bishopric member emphasizes the importance of accomplishing the purposes of the Aaronic Priesthood. He evaluates each young man's progress and encourages him.

When interviewing a young woman, the bishopric member emphasizes the importance of incorporating the Young Women values and the standards of personal worthiness in her daily living (see pages 211–12 in *Book* 2). He also emphasizes the importance of completing the Personal Progress program. He evaluates the young woman's progress and encourages her.

When interviewing young men or young women of seminary age, the bishopric member emphasizes the importance of regular attendance at seminary and the blessings that come from active participation.

When discussing moral cleanliness, the bishop adapts the discussion to the understanding of the youth. He also ensures that the discussion does not arouse curiosity or experimentation.

Other Interviews

Interviews for Convert Baptisms

See page 26.

Interviews of Persons to Be Readmitted by Baptism

For instructions on interviewing persons who have been excommunicated and want to be readmitted by baptism, see pages 104–5.

For instructions on interviewing persons who have had their names removed from Church records and want to be readmitted by baptism, see page 130.

Counseling

As judges in Israel, stake presidents and bishops counsel stake and ward members who seek spiritual guidance, who have weighty personal problems, or who have committed serious transgressions. The stake president or bishop may not assign this to a counselor except in the most urgent cases when he is absent.

Church members should make a diligent effort, including earnest prayer and scripture study, to find solutions and answers themselves. If they still need help, they should counsel first with their bishop. If necessary, he refers them to the stake president. Local leaders should discourage members from calling, visiting, or writing to Church headquarters about personal matters.

The stake president and bishop are entitled to the discernment and inspiration necessary to be spiritual advisers and temporal counselors to ward members who need such help. They should prepare spiritually before counseling a member, seeking the power of discernment and the guidance of the Spirit. This guidance usually comes as impressions, thoughts, or feelings. The Spirit often prompts leaders to remember teachings from the scriptures and from latter-day prophets.

The stake president or bishop should schedule adequate time for appointments. Members should not feel that he is too busy and can devote only a few minutes to them. He also should help members feel comfortable as the appointment begins.

If the stake president or bishop does not feel prepared to counsel a member, he should schedule another appointment. Between appointments he should seek guidance through study, prayer, and, if necessary, fasting. He also may confer with his priesthood leader.

The stake president or bishop should counsel members privately in his office. When meeting with a woman, he should ask a priesthood holder to be in an adjoining room, foyer, or hall. He should avoid circumstances that might be misunderstood.

The stake president or bishop should avoid making decisions for those he counsels. Instead, he helps them make their own decisions with the Lord's guidance. He also helps them analyze and resolve problems or questions in the context of the doctrines of the gospel and the plan of salvation.

When counseling, the stake president or bishop asks questions to help him understand the member's situation, though he should avoid unnecessary probing. Questions usually should bring out feelings and thoughts rather than *yes* or *no* replies. Members should do most of the talking.

While members talk, the stake president or bishop should listen carefully, giving full and sincere attention. Listening is vital in establishing confidence and trust. People often need someone they trust to listen to them as they work through their challenges and problems.

If a member has transgressed, the stake president or bishop firmly and lovingly helps him or her repent. He teaches that repentance includes having a broken heart and contrite spirit, recognizing and forsaking sin, seeking forgiveness, making restitution, and demonstrating a renewed commitment to keep the commandments. If necessary, he imposes informal Church discipline or initiates formal discipline. He should be familiar with the circumstances that may necessitate Church discipline and the procedures for initiating it.

When counseling members, the stake president and bishop help them take preventive action to resist temptations. For example, members who are courting, are having difficulty in their marriages, are separated or divorced, and are struggling with minor moral problems may be protected and strengthened by counseling designed to help them guard against transgression. Presiding officers need not wait for members to seek such help, but may call them in for counseling.

If a member needs professional counseling or therapy, the stake president or bishop should select or recommend a professional who will work in harmony with gospel teachings and principles. Leaders may work through LDS Social Services where it is available.

No priesthood officer is to counsel a person whom to marry. Nor should he counsel a person to divorce his or her spouse. Those decisions must originate and remain with the individual.

When a marriage ends in divorce, or if a husband and wife separate, they should always receive counseling from Church leaders. One or both may also need Church discipline if they have committed serious transgressions in connection with the divorce or separation.

The stake president or bishop may give a priesthood blessing if the member who is being counseled sincerely wants one.

Keeping Confidences

During and after their term of service in a calling, leaders must keep confidences about matters discussed when interviewing and counseling. A breach of confidence can damage trust, testimonies, and faith. A leader must not discuss confidential matters with others, including his counselors and wife, unless he receives consent from the person he is interviewing or counseling. If the bishop or a counselor in the stake presidency encounters matters that need to be discussed with the stake president, he should explain this to the member and refer the member to the stake president without delay.

Responding to Abuse

While interviewing or counseling a person, a priesthood leader may become aware of incidents of abuse of a child, spouse, or other person. Abuse cannot be tolerated in any form. Guidelines for responding to abuse are provided on pages 157–58.

10. Church Discipline

For units in the United States and Canada, the term *administration office* in this section refers to Church headquarters in Salt Lake City.

For units outside the United States and Canada, the term *administration office* refers to the Presiding Bishopric administration office or service center that serves the unit.

In this section, references to transgressors are in the masculine gender but also include the feminine.

Purposes of Church Discipline

The purposes of Church discipline are (1) to save the souls of transgressors, (2) to protect the innocent, and (3) to safeguard the purity, integrity, and good name of the Church. These purposes are accomplished through private counsel and caution, informal probation, formal probation, disfellowshipment, and excommunication (see pages 93–95).

Save the Souls of Transgressors

When a person sins, the demands of eternal justice require repentance or punishment (see Alma 42:13–22; D&C 19:16–18). The first purpose of Church discipline is to save the souls of transgressors by helping them repent (see D&C 1:31–32; 19:13–20; 42:37; 64:12–13). When they repent, God forgives them, granting them mercy through the Atonement of Jesus Christ (see Alma 42:23; D&C 58:42). Through this process a person may once again become clean and worthy to inherit the kingdom of God (see 3 Nephi 27:19; Moses 6:57).

Church discipline can facilitate repentance by helping transgressors recognize and forsake sin, seek forgiveness, make restitution, and demonstrate a renewed commitment to keep the commandments. Informal Church discipline often is adequate for this purpose (see pages 93–94). However, in some instances the only way to encourage true repentance is to convene a disciplinary council (formerly called a Church court) and consider formal discipline (see pages 94–95). Without formal discipline, some transgressors may never experience the change of behavior and change of heart necessary to qualify them for redemption through the Atonement, for "none but the truly penitent are saved" (Alma 42:24).

Protect the Innocent

The second purpose of Church discipline is to protect the innocent. With inspiration, a priesthood leader should act to protect Church members when a transgressor poses a physical or spiritual threat to them, such as by physical harm, sexual abuse, drug misuse, fraud, or apostasy (see Alma 5:59–60).

Safeguard the Integrity of the Church

The third purpose of Church discipline is to safeguard the purity, integrity, and good name of the Church. Consequently, transgressions that significantly impair the good name or moral influence of the Church may require the action of a disciplinary council.

Responsibility for Church Discipline

God does not overlook sin, and His servants cannot ignore evidence of serious transgressions (see Mosiah 26:29; D&C 1:31). Stake presidents, bishops, mission presidents, district presidents, and branch presidents are called and set apart to be judges in Israel (see D&C 107:72–74). They are to "judge . . . by the testimony of the just, . . . according to the laws of the kingdom which are given by the prophets of God" (D&C 58:18).

Church leaders are to help members avoid transgression. If a member commits a serious transgression, leaders administer Church discipline in a spirit of love so it can bless the life of the transgressor. To do this, leaders must be guided and inspired by the Lord.

Church discipline is administered in the ward that has the transgressor's membership record (see page 92 for exceptions). Church leaders' responsibilities for initiating and administering Church discipline are outlined in the following paragraphs.

Stake President

The stake president has authority over the Church discipline of all members in a stake. However, bishops normally administer Church discipline unless evidence indicates that a person who holds the Melchizedek Priesthood is likely to be excommunicated. In that case, the stake president convenes the disciplinary council.

High Council

The high council participates whenever a stake president convenes a disciplinary council (see pages 97, 99–100, and 105).

Bishop

The bishop administers most Church discipline. He has authority for the discipline of all members in his ward, except the excommunication of a member who holds the Melchizedek Priesthood.

The bishop must confer with the stake president and obtain his approval before convening a disciplinary council. If evidence indicates that a Melchizedek Priesthood holder is likely to be excommunicated, the bishop immediately transfers the matter to the stake president.

Branch President in a Stake

A branch president in a stake may administer Church discipline as authorized by the stake president. He may receive general authorization to administer informal Church discipline. He must receive authorization in each case to convene a disciplinary council and administer formal discipline.

If evidence indicates that a Melchizedek Priesthood holder is likely to be excommunicated, the branch president immediately transfers the matter to the stake president. If a branch disciplinary council recommends excommunication of a member who does *not* hold the Melchizedek Priesthood, the stake president's approval is required before the decision is final.

Mission President

The mission president administers or oversees Church discipline of members in mission branches and districts. If time or distance prevents him from personally convening a disciplinary council for one of these members, he may authorize three Melchizedek Priesthood holders to convene it as outlined on page 98. If this disciplinary council recommends excommunication, the mission president's approval is required before the decision is final.

The mission president also administers Church discipline for full-time missionaries who commit serious transgressions in the mission field. Before convening a disciplinary council for a full-time missionary, the mission president reviews the matter with a member of the Area Presidency and must receive authorization from a General Authority in the Missionary Department (see page 86).

District President and Branch President in a Mission

A district president or branch president in a mission may administer Church discipline as authorized by the mission president. The guidelines under "Branch President in a Stake" apply, with the mission president fulfilling the same responsibilities as the stake president.

Jurisdiction in Special Circumstances

If a member who needs Church discipline moves to another ward before action is taken, the bishops of both wards consult to determine where the disciplinary action should be taken. They consider such matters as the accessibility of key witnesses and the need for continuing efforts to encourage repentance and restoration to full fellowship. If the bishops determine that the bishop of the former ward should take the disciplinary action, he retains the membership record until the action is taken. Otherwise he transfers the membership record and confidentially informs the bishop of the current ward of the circumstances that warrant Church discipline.

If a member is living away from home temporarily (attending school or serving in the military, for example), his bishop at the place of temporary residence may counsel him or place him on informal probation. However, this bishop should consult the bishop of the home ward before initiating formal disciplinary action.

If a full-time missionary commits a serious transgression that is not revealed until after he has been released, the bishop of his current ward confers with the stake president and mission president. If evidence indicates that the member is likely to be excommunicated, the stake president convenes a disciplinary council. Otherwise he may authorize the bishop to convene a disciplinary council.

Confessions

Repentance requires that all sins be confessed to the Lord. "By this ye may know if a man repenteth of his sins—behold, he will confess them and forsake them" (D&C 58:43). Members also should confess to their presiding officer if they have committed serious transgressions. Members who voluntarily and completely confess transgressions demonstrate that they have begun the process of repentance.

Presiding officers should respond to confessions with love and understanding. If a sin that is confessed may be serious enough to require formal Church discipline, the presiding officer explains this to the member.

Presiding officers should encourage members to seek the Lord's forgiveness, forsake the transgression, and make restitution.

Restitution

As part of the restitution required for repentance, transgressors should do all they can to restore what their transgression has taken from others. They also should seek forgiveness from the people they have wronged. The repentance of a married person who is involved in a sexual transgression usually should include confessing to and seeking forgiveness from his spouse. A young unmarried person who commits a sexual transgression should be encouraged to inform his parents.

Repentance may include disclosure to government authorities. If confidential information indicates that a member has violated applicable law, the bishop or stake president should urge him to report the matter to appropriate government authorities. To obtain guidance on local laws that govern reporting abuse, see the instructions on page 158.

Disclosure of the identity of others who participated in a transgression should be *encouraged* as part of the repentance process, especially when this can help Church leaders encourage the repentance of those participants.

Disclosure of the identity of others who participated in a transgression may be *required* when it is necessary to restore or protect persons who have been or may be seriously injured as a result of the transgression. For example, a sexual transgressor who has been exposed or who has exposed others to a sexually transmitted disease must make the disclosures necessary to protect others. Predators may need to be identified to protect potential victims. A transgressor who holds or has held a prominent position of trust may need to be identified to Church leaders for the spiritual protection of members.

Investigation

A bishop interviews any member of his ward who is accused of a serious transgression. If the member denies an accusation that the bishop has reliable evidence to support, the bishop (or the stake president if he will preside over the disciplinary council) gathers further evidence that would confirm or disprove the accusation. The presiding officer may conduct the investigation himself, or he may assign two reliable Melchizedek Priesthood holders to do so. He instructs them not to use methods that are unbecoming to priesthood holders or that could result in legal action. For example, they must not use electronic surveillance devices, hidden cameras, or tape recorders. They also must not maintain a watch on a member's home.

Confidentiality

Bishops, stake presidents, and counselors in a stake presidency have a solemn duty to keep confidential all information that members give them in confessions and interviews. The same duty of confidentiality applies to all who take part in Church disciplinary councils. It includes what is said in the presentation of evidence and in deliberations. Confidential information must not be shared with anyone except authorized ecclesiastical leaders.

Information received in a member's confession cannot be used as evidence in a disciplinary council without the member's consent. When necessary, a bishop attempts to persuade the member to give this consent. He explains that refusal reflects a lack of contrition and repentance, preventing justice and mercy from operating fully for the good of the transgressor. If consent is not given, the bishop can still impose informal discipline on the basis of the confession. A lack of consent to use a confession in evidence does not prevent a disciplinary council from proceeding on the basis of other evidence.

If a bishop learns that a Church member outside his ward may have been involved in a serious transgression, he informs that member's bishop confidentially. When members of different wards transgress together, and when one has disclosed to his bishop the identity of the other transgressor, the bishop to whom the disclosure was made consults with the bishop of the other member.

If civil authorities challenge the confidentiality required of a clergyman, the priesthood leader who is challenged should seek legal advice from the Office of Legal Services at Church headquarters (telephone 1-801-240-6301 or 1-800-453-3860, extension 6301) or from local legal counsel in Church area offices.

Informal Church Discipline

A bishop or branch president normally administers informal Church discipline. His counselors do not participate, and no disciplinary council is held. Except for the most serious transgressions, informal discipline may be sufficient for genuinely repentant persons (especially those who have confessed voluntarily), first offenders, those who have not violated temple covenants by their transgression, and those with significant mitigating circumstances. (See D&C 42:25–26 and pages 103–4.)

Informal Church discipline includes (1) private counsel and caution and (2) informal probation.

Private Counsel and Caution

Private counsel and caution may be sufficient discipline for members who have committed minor transgressions and are genuinely repentant.

Presiding officers counsel members to resist temptation and help them take preventive action to resist specific temptations. For example, such counseling often helps members who have committed minor moral transgressions guard against major transgressions. In addition, members who are courting, are having difficulty in their marriages, or are separated or divorced are often protected and strengthened by counseling designed to help them resist temptation. Presiding officers need not wait for members to seek such help, but may call them in for counseling.

For more information about counseling, see pages 21–22.

Informal Probation

Informal probation is a means for a presiding officer to restrict some of a transgressor's privileges of Church membership in ways that the officer specifies. Such restrictions may include suspending the right to partake of the sacrament, hold a Church position, exercise the priesthood, and enter a temple. If the privilege of entering a temple is suspended, a member should give his temple recommend to the presiding officer for the period of suspension. Wisely administered and humbly received, informal probation can be effective in helping a transgressor repent.

In less serious cases, a presiding officer may determine that a member needs a more active rather than a less active exercise of the privileges of Church membership. In these cases, informal probation may include positive conditions such as regular Church attendance, regular prayer, and reading selected scriptures or Church literature.

A bishop normally does not inform anyone of a decision to place a member on informal probation. No official record is made of such decisions, but the bishop may make private notes for his own use. He should keep these notes secure and destroy them after the probation concludes. If a bishop is released or if the member moves to a new ward before informal probation ends, the bishop may inform the new bishop to the extent necessary for the new bishop to supervise the remaining probation.

When a member who is on informal probation makes specified progress and meets prescribed conditions, the presiding officer may end the probation. If the member does not make this progress and meet the conditions, additional disciplinary action may be needed.

Formal Church Discipline

Formal Church discipline is administered in a disciplinary council (see "Disciplinary Councils," pages 95–103). This discipline is ecclesiastical, not civil or criminal. It can affect only a member's standing in the Church (see D&C 134:10).

At times, formal discipline is the only way to help a transgressor repent, to protect the innocent, or to safeguard the purity and good name of the Church. A presiding officer who is unwilling to proceed in such cases is not fulfilling his responsibilities as a common judge. Presiding officers should approach formal discipline with a prayerful desire to help, not to condemn.

Formal Church discipline includes formal probation, disfellowshipment, and excommunication.

Formal Probation

Formal probation is an action taken by a disciplinary council to restrict or suspend some of a transgressor's privileges of Church membership in ways that the council specifies. These restrictions could include or go beyond those imposed by informal probation. Positive conditions similar to those imposed by informal probation could also be prescribed.

When a member on formal probation makes specified progress and meets prescribed conditions, the presiding officer may convene another disciplinary council to consider ending the probation (see pages 104–6). If the member does not make this progress and meet the conditions, the disciplinary council may continue probation or take more severe disciplinary action.

Disfellowshipment

A person who is disfellowshipped is still a member of the Church but is no longer in good standing. Disfellowshipment is a severe action that may be adequate for all but the most serious transgressions.

A person who is disfellowshipped may not hold a temple recommend, serve in a Church position, or exercise the priesthood in any way. He should be encouraged to attend public Church meetings if his conduct is orderly, but he may not give a talk, offer a public prayer, partake of the sacrament, or participate in the sustaining of Church officers. The presiding officer may impose additional restrictions, such

as staying away from pornographic materials and other evil influences. He also may impose positive conditions such as regular Church attendance, regular prayer, and reading selected scriptures or Church literature.

Disfellowshipped members are encouraged to pay tithes and offerings, to continue wearing temple garments if endowed, and to seek a return to fellowship in the Church through sincere repentance and righteous living.

Disfellowshipment is intended to be temporary but usually lasts at least one year. When a member shows true repentance and satisfies the conditions imposed, the presiding officer may convene another disciplinary council to consider restoring him to full fellowship (see pages 104–6). If a member does not repent, the disciplinary council may continue disfellowshipment or consider excommunication.

Excommunication

A person who is excommunicated is no longer a member of the Church. Excommunication is the most severe Church disciplinary action. As directed by the Spirit, it may be necessary for:

1. Members who have committed serious transgressions, especially violations of temple covenants (see "Considerations in Church Discipline," pages 103–4).
2. Members who have been disfellowshipped and have not repented and for whom excommunication seems to offer the best hope for reformation.
3. Members whose conduct makes them a serious threat to others and whose Church membership facilitates their access to victims.
4. Church leaders or prominent members whose transgressions significantly impair the good name or moral influence of the Church in the community that is aware of the transgression.

Excommunication is mandatory for murder and almost always required for incest.

A person who is excommunicated does not enjoy any privileges of Church membership. He may not wear temple garments or pay tithes and offerings. He may attend public Church meetings if his conduct is orderly, but his participation in such meetings is limited the same as for disfellowshipped members.

If a person shows true repentance and satisfies the conditions imposed while he is excommunicated, he may be readmitted by baptism. The readmission process is explained on pages 104–6.

For information about the effects of excommunication on temple sealings, see pages 74 and 76.

Disciplinary Councils

Because formal Church discipline is ecclesiastical, not civil or criminal, court procedures of the state or nation do not apply. However, procedures in a Church disciplinary council must be fair and considerate of the feelings of all who participate.

When a Disciplinary Council Is Mandatory

A disciplinary council *must* be held when evidence suggests that a member may have committed any of the following transgressions.

Murder

As used here, *murder* refers to the deliberate and unjustified taking of human life. It requires excommunication. Abortion is not defined as murder for this purpose. If death was caused by carelessness or by defense of self or others, or if mitigating circumstances prevail (such as deficient mental capacity or wartime conditions), the taking of a human life might not be defined as murder. Bishops refer questions on specific cases to the stake president. He may direct questions to the Office of the First Presidency if necessary.

Incest

As used here, *incest* refers to sexual relations between a parent and a natural, adopted, or foster child or stepchild. A grandparent is considered the same as a parent. Incest also refers to sexual relations between brothers and sisters. It almost always requires excommunication. Bishops refer questions on specific cases to the stake president. He may direct questions to the Office of the First Presidency if necessary.

Child Abuse

As used here, *child abuse* refers to a sexual offense against or serious physical abuse of a child. If priesthood leaders learn of or suspect child abuse, they should follow the instructions on pages 157–58.

Apostasy

As used here, *apostasy* refers to members who:

1. Repeatedly act in clear, open, and deliberate public opposition to the Church or its leaders.

2. Persist in teaching as Church doctrine information that is not Church doctrine after they have been corrected by their bishops or higher authority.
3. Continue to follow the teachings of apostate sects (such as those that advocate plural marriage) after being corrected by their bishop or higher authority.

In such cases, excommunication may be necessary if repentance is not evident after counseling and encouragement.

Priesthood leaders must take disciplinary action against apostates to protect Church members. The Savior taught the Nephites that they should continue to minister to a transgressor, but "if he repent not he shall not be numbered among my people, that he may not destroy my people" (3 Nephi 18:31; see also Mosiah 26:36).

Total inactivity in the Church or attending or holding membership in another church does not constitute apostasy.

Serious Transgression While Holding a Prominent Church Position

A disciplinary council must be held for a member who commits a serious transgression while holding a prominent Church position, such as Area Authority Seventy; temple, mission, or stake president; patriarch; or bishop. As used here, *serious transgression* is defined as a deliberate and major offense against morality. It includes (but is not limited to) attempted murder, rape, forcible sexual abuse, spouse abuse, intentional serious physical injury of others, adultery, fornication, homosexual relations, deliberate abandonment of family responsibilities, robbery, burglary, theft, embezzlement, sale of illegal drugs, fraud, perjury, and false swearing.

Transgressor Who Is a Predator

A disciplinary council must be held for a member who commits a serious transgression that shows him to be a predator with tendencies that present any kind of serious threat to other persons.

Pattern of Serious Transgressions

A disciplinary council must be held for a member who demonstrates a pattern of serious transgressions, especially if prior transgressions have resulted in Church discipline.

Serious Transgression That Is Widely Known

A disciplinary council must be held for a member who commits a serious transgression (as defined under "Serious Transgression While Holding a Prominent Church Position" on this page) that is widely known.

When a Disciplinary Council May Be Necessary

Serious Transgression

Formal Church discipline may be necessary for any member who commits a serious transgression as defined under "Serious Transgression While Holding a Prominent Church Position" on this page.

Abortion

Presiding officers review carefully the circumstances of members involved in abortions. Formal Church discipline may be necessary for members who submit to, perform, encourage, pay for, or arrange for abortions. However, Church discipline should not be considered for members who were involved in an abortion before they were baptized or because (1) the pregnancy resulted from forcible rape or incest, (2) the life or health of the mother was in jeopardy, or (3) the fetus was known to have severe defects that would not allow the baby to survive beyond birth (see page 157). Bishops refer questions on specific cases to the stake president. He may direct questions to the Office of the First Presidency if necessary.

Transsexual Operation

Church leaders counsel against elective transsexual operations. If a member is contemplating such an operation, a presiding officer should inform him of this counsel and advise him that the operation may be cause for formal Church discipline. Bishops refer questions on specific cases to the stake president. He may direct questions to the Office of the First Presidency if necessary.

Request for Name Removal

If a member requests that his name be removed from the records of the Church, a disciplinary council may still be necessary if he has committed a serious transgression. Name removal should not be used as a substitute for or alternative to Church discipline. For instructions in these circumstances, see page 130.

When a Disciplinary Council Is Not Necessary

A disciplinary council normally is not necessary in the following instances.

Failure to Comply with Some Church Standards

A disciplinary council should not be held to discipline or threaten members who do not comply with the Word of Wisdom or whose transgressions consist of omissions, such as failure to pay tithing, inactivity in the Church, or inattention to Church duties.

Business Failures or Nonpayment of Debts

Leaders or members should not use the threat of Church discipline as a form of harassment or as a device to settle business controversies. Business failures and nonpayment of debts are not reasons for convening a disciplinary council. However, a disciplinary council may be held for deceptive practices, false representations, or other forms of fraud or dishonesty in business transactions.

Civil Disputes

Disciplinary councils should not attempt to resolve disputes over property rights or other civil controversies. However, if such a dispute involves accusations that a member has committed acts that would justify Church discipline, the accusations should be treated like any other accusations of transgression.

If Church leaders are asked to help settle civil disputes, they should act as unofficial, private advisers and should not involve the Church.

Passage of Time

If a member voluntarily confesses a serious transgression that was committed long ago and his faithfulness and service in the intervening years have demonstrated full reformation and repentance, a disciplinary council often is unnecessary. See also "Time between Transgression and Confession," page 103.

Possible Decisions

A disciplinary council can reach any of the following decisions:

1. No action. A disciplinary council can reach this decision even if a transgression has been committed. As part of this decision, the member may be given cautionary counsel or referred to his bishop for an interview that might lead to informal discipline.
2. Formal probation (see page 94).
3. Disfellowshipment (see pages 94–95).
4. Excommunication (see page 95).

If discipline is imposed, the presiding officer interviews the person regularly. The officer counsels him in love, helps him repent, and encourages him to live so he may again enjoy the full blessings of Church membership.

Leaders Who Are to Participate

Stake Disciplinary Councils

All three members of the stake presidency and all twelve members of the high council participate in a stake disciplinary council. If a counselor in the stake presidency is unable to participate, the stake president calls a member of the high council to take the counselor's place. If a high councilor is unable to participate, the stake president calls a high priest in the stake to take the high councilor's place. If the stake president is unable to participate, the First Presidency may authorize one of his counselors to preside in his place. If filling one vacancy creates another, the presiding authority fills it as prescribed in this paragraph.

Ward Disciplinary Councils

All three members of the bishopric participate in a ward disciplinary council. If the bishop is unable to participate, he refers the case to the stake president. The bishop may not assign a counselor to convene or preside over a disciplinary council. If a counselor in the bishopric is unable to participate, the bishop may ask a high priest in the ward to take the counselor's place. If a high priest is unavailable, the bishop refers the case to the stake president.

The bishop always consults with the stake president and obtains his approval before convening a disciplinary council.

Branch Disciplinary Councils in a Stake

A branch president in a stake may convene a disciplinary council when authorized by the stake president. All three members of the branch presidency participate in the disciplinary council.

Mission Disciplinary Councils

When a mission president holds a disciplinary council for members or full-time missionaries under his jurisdiction, he appoints two Melchizedek Priest-

hood holders to assist him. A disciplinary council in a mission follows the procedures and exercises the authority specified for a disciplinary council in a stake, except that a high council does not participate.

If time or distance prevents a mission president from personally holding a disciplinary council for a member under his jurisdiction, he may authorize three Melchizedek Priesthood holders to convene a mission disciplinary council. Normally the presiding officer is the member's district president or branch president (see "District and Branch Disciplinary Councils in a Mission" below).

A mission president must preside over disciplinary councils for full-time missionaries in his mission.

District and Branch Disciplinary Councils in a Mission

A district president or branch president in a mission may convene a disciplinary council when authorized by the mission president. A district council does not participate in disciplinary councils.

General Instructions about Participation

If a transgressor objects to the participation of a counselor in the bishopric or stake presidency, the presiding officer evaluates the objection. If the presiding officer concludes that the objection is reasonable in fact or appearance, the counselor should not participate. If the transgressor objects to the bishop, the disciplinary matter must be referred to the stake president. If the transgressor objects to the stake president, or if the stake president feels that he cannot be impartial in the matter, he consults the Office of the First Presidency.

If a member of a bishopric, stake presidency, or high council or a clerk has a legal duty because of his occupation (such as a law enforcement officer) to report to government authorities facts that are likely to be disclosed in a disciplinary council, he should not participate.

Notice and Scheduling

Presiding officers should not schedule a disciplinary council until (1) they have had adequate time to determine the relevant facts and (2) they and the transgressor and the aggrieved parties have had adequate time to give unhurried consideration to the consequences of the transgression.

Notice of a Disciplinary Council to Consider Imposing Church Discipline

The presiding officer gives a member written notice of a disciplinary council that will be held in his behalf. This notice should be addressed to the member by his full name and signed by the presiding officer. It should state:

1. That "the [stake presidency or bishopric] is considering formal disciplinary action in your behalf, including the possibility of disfellowshipment or excommunication, because you are reported to have [set forth the charge in general terms, such as 'been in apostasy' or 'participated in conduct unbecoming a member of the Church,' but do not give any details or evidence]."
2. That "you are invited to attend this disciplinary council to give your response and, if you wish, to provide witnesses and other evidence in your behalf."
3. That "the disciplinary council will be held on [date and time] at [place]."

Two Melchizedek Priesthood holders deliver the notice to the member personally and privately with courtesy and dignity. The members who deliver the notice must give the clerk of the disciplinary council a signed statement certifying that the member was notified and describing how he was notified.

If the notice cannot be delivered in person, it may be sent by registered or certified mail, with a return receipt requested.

A member who is incarcerated when the council is to be held is notified as specified in the preceding paragraphs, with one exception: since he would not be able to attend, he should not be invited. However, the letter should invite him to send evidence in his behalf, including a written response about the crime with which he has been charged and, if applicable, convicted. The letter also may invite him to tell how he feels about continued fellowship or membership in the Church.

Notice of a Disciplinary Council to Consider Ending Church Discipline

See page 105.

Procedures of the Council

Councils to Consider Imposing Church Discipline

The stake president, bishop, mission president, district president, or branch president conducts the

disciplinary council. He also rules on the procedures that are followed and the evidence that is presented.

A clerk records the proceedings of the council as a basis for completing the Report of Church Disciplinary Action form, but he does not participate in the discussion or decision.

The presiding officer helps the member prepare for the disciplinary council by explaining its purpose and procedures. If the member has confessed and given consent, the presiding officer explains that the confession will be used in the council. He also explains the consequences of the decisions the council may reach.

Immediately before the council begins, the presiding officer tells his counselors (and the high council if it is a stake disciplinary council) whom it is for and what the reported misconduct is. If necessary, he explains the procedures of the council to these leaders. The person is then invited into the meeting and introduced.

The council is opened with prayer. Then the presiding officer or someone designated by him states the reported misconduct and asks the member to respond by admitting or denying it.

If the member denies the reported misconduct, the presiding officer or someone designated by him presents the evidence of the misconduct. This evidence includes the written or oral statements of witnesses, reliable documents, and the substance of the member's confession (if he has confessed and given consent). The member must be given an opportunity to question the witnesses against him. (If witnesses are unable to attend, see page 102.)

The member then presents his response. He may bring in witnesses one at a time, submit other relevant evidence, comment on the evidence, and make any other statements he wants to make.

Witnesses should be Church members unless the presiding officer has determined in advance that a nonmember witness will respect the purposes and procedures of a Church disciplinary council. Witnesses wait in a separate room until they give their evidence. The presiding officer asks them not to talk with each other about the matter either before or after they testify.

The presiding officer and his counselors may ask questions of the member or witnesses in an orderly, polite manner, avoiding argument. Questions are to be brief and limited to the essential facts of the case.

When all relevant matters have been presented, the presiding officer excuses the member and, with his counselors, prayerfully deliberates over what action to take. The presiding officer is the judge, and he makes the decision through inspiration. If his counselors have a different opinion, he listens and seeks to resolve the differences so the decision can be unanimous.

If there is not enough evidence to justify formal Church discipline but the presiding officer feels that the matter should not be concluded at that time by a decision of no action, he may adjourn the council temporarily to seek additional evidence.

After reaching a decision, the presiding officer may invite the person back into the council meeting to inform him of it. If the decision is formal probation, disfellowshipment, or excommunication, the presiding officer explains the terms and conditions imposed by the decision, tells the person in a spirit of love how to overcome those restrictions, and offers other appropriate instruction and counsel.

If the person holds a valid temple recommend and the right to enter the temple has been withdrawn, he gives the recommend to the presiding officer at this time, unless he has already done so.

The presiding officer explains the person's right to appeal (see page 101) and closes the meeting with prayer.

If the person does not attend the council, the presiding officer informs him of the decision and gives instruction and counsel by meeting with him or by other means if necessary.

Disciplinary councils should not be recorded on videotape or audiotape.

Councils to Consider Ending Church Discipline

See pages 104–6.

High Council Participation

Stake disciplinary councils always include the high council. The basic principles governing the participation of the high council, including the casting of lots to determine the order of speaking, are stated in Doctrine and Covenants 102:12–23.

The following paragraphs provide additional instructions on questions that have arisen as stake presidencies and high councils have applied these principles. For example, it should be remembered that a Church disciplinary council is not organized as a criminal trial and does not follow the procedures of such a trial. The high council is not a jury.

Except as stated in the following paragraphs, up to the time of deliberation the procedures for a stake

disciplinary council are the same as those prescribed for other disciplinary councils.

During the presentation of evidence, any member of the high council may ask questions in an orderly, polite manner, avoiding argument with the member or witnesses. Questions are to be brief and limited to the essential facts of the case.

After all the evidence has been presented, the appointed high councilors present their views of the matter. They are not prosecutors or defenders. They are councilors, responsible to see that the evidence is examined in its true light before the council. Each is to speak "according to equity and justice" (D&C 102:16). One-half of those appointed to speak are responsible "to stand up in behalf of the accused, and prevent insult and injustice" (D&C 102:17).

The accused member and the accuser (if any) are then given another opportunity to speak, after which they are excused from the council room.

After hearing any additional comments from the high council, the stake presidency withdraws from the council room to confer in private. After consultation and prayer, the stake president makes the decision and invites his counselors to sustain it.

The stake presidency then returns and announces the decision to the high council. The stake president asks the high councilors as a group to sustain his decision. The high council cannot veto the decision; it is binding even if it is not sustained unanimously. However, if one or more high councilors object to the decision, the stake president should make every effort to resolve the concerns and achieve unanimity. He may recall witnesses for further questioning. If necessary, the disciplinary council may again review the evidence, but not in the presence of the member.

Written Notice of the Decision

After a Council Has Imposed Church Discipline

The presiding officer ensures that a person who is placed on formal probation, disfellowshipped, or excommunicated by a disciplinary council receives prompt written notice of the decision and its effects, even if he has been advised orally. This notice should consist of a general statement that the person has been placed on formal probation, disfellowshipped, or excommunicated for conduct contrary to the laws and order of the Church. It also could include counsel to help the person come back into full fellowship in the Church. The presiding officer does not give the person a copy of the Report of Church Disciplinary Action.

After a Council Has Ended Church Discipline

See page 106.

Announcement of the Decision

When announcing Church discipline, leaders must consider the feelings of the transgressor's innocent family members and the needs of innocent potential victims.

A decision to place a member on informal probation is not announced.

A decision to place a member on formal probation may be announced to those who need to know if the presiding officer determines that an announcement is necessary.

A decision of disfellowshipment or excommunication is announced only to those who need to know. The principles and procedures in the following paragraphs govern such announcements.

No announcement is made if a decision is being appealed, unless the presiding officer of the disciplinary council concludes that an announcement pending appeal is necessary to protect potential victims, to support the healing of victims (although victims' names are not announced), or to safeguard the name of the Church.

The bishop announces the decision in confidence in ward priesthood executive committee meeting to guide priesthood officers who might otherwise consider the disciplined person for Church service, offering prayers, or giving talks or lessons.

The bishop advises the ward Relief Society president in confidence when a member of the Relief Society has been disciplined or was a victim.

If a case concerns (1) the preaching of false doctrine, (2) a transgressor whose predatory tendencies seriously threaten other persons, or (3) other flagrant transgressions (such as ridicule of Church leaders, plural marriage, or cultist teachings to attract a following), then, with the approval of the stake president, the bishop announces the decision in meetings of the elders quorum, high priests group, and Relief Society in his ward. In such cases the stake president also may need to authorize a broader announcement, such as in a stake priesthood meeting or to the Melchizedek Priesthood brethren and Relief Society sisters of other wards in the stake. In some cases the presiding officer may find it beneficial to notify some or all of the victims and, when necessary, their families that the transgressor has been the subject of a disciplinary council.

When an announcement of Church discipline is necessary, it is limited to a general statement that the person has been disfellowshipped or excommunicated for conduct contrary to the laws and order of the Church. The officer who makes the announcement asks those who hear it not to discuss it with anyone. Announcements of disfellowshipment or excommunication do not require a sustaining vote.

To dispel rumors, a bishop or stake president may need to announce that a disciplinary council considered charges against a member but that no action was taken.

Appeals

A person who has been excommunicated, disfellowshipped, or placed on formal probation by a disciplinary council may appeal the decision. An appeal of the action of a ward disciplinary council is to the stake presidency (and high council). An appeal of the action of a stake disciplinary council is to the First Presidency. An appeal of the action of a branch or district disciplinary council is to the mission president. An appeal of the action of a disciplinary council presided over by a mission president is to the First Presidency.

If a person who has been disciplined wants to appeal the decision, he should specify in writing the alleged errors or unfairness in the procedure or decision. The person should present the appeal within 30 days to the presiding officer of the disciplinary council that made the decision. If a bishop or branch president presided over the council, he forwards the appeal with the Report of Church Disciplinary Action and other relevant documents to the stake or mission president. If the stake or mission president presided over the council, he forwards the materials to the First Presidency.

The decision on the appeal may be to (1) let the initial decision stand, (2) modify the initial decision, or (3) direct the disciplinary council to rehear the matter. In addition, the First Presidency may refer an appeal to another priesthood officer or body for review (with or without receiving additional evidence) and resubmittal to the First Presidency with a recommendation.

Reports on Disciplinary Councils

The presiding officer asks a clerk to summarize the proceedings of the disciplinary council on a Report of Church Disciplinary Action form. The form provides instructions on how to complete it, whether to retain or submit it, and how to submit it.

Membership Records After Discipline Has Been Imposed

Members Placed on Formal Probation

Formal probation is not noted on a membership record. However, the record may be annotated if a person is placed on formal probation for one of the reasons explained on page 129.

Disfellowshipped Members

Disfellowshipment is noted on a person's membership record. The administration office makes this note and provides an updated record after receiving the Report of Church Disciplinary Action.

If a disfellowshipped member moves, the bishop transfers the membership record to the new ward. The record will notify the new bishop that the person has been disfellowshipped. The bishop may also contact the bishop of the new ward to communicate relevant information about the disciplinary action.

Excommunicated Members

When a person is excommunicated, his name is removed from the membership records of the Church. The administration office takes this action after receiving the Report of Church Disciplinary Action.

Although a person who is excommunicated no longer has a membership record, the presiding officer of the disciplinary council asks for his consent to retain his name and address so Church leaders can continue to assist him. The presiding officer does this with genuine love and concern at a time when the excommunicated person is most likely to consent. This may be immediately after the person is told of the excommunication decision or at a later time. If the person consents, this is noted on the Report of Church Disciplinary Action.

If an excommunicated person moves after consenting to have the Church maintain contact with him, the bishop contacts the bishop of the new ward, giving him the person's name and address and communicating relevant information about the disciplinary action.

If an excommunicated person moves after not giving consent to have the Church maintain contact with him, the bishop contacts the bishop of the new ward, identifies the person involved, and indicates that a disciplinary council has been held and that the person has requested that no further information be shared and no contact be made. The request of

the excommunicated person should be respected until there is a change of mind.

Records with Annotations

See page 129.

Procedures in Exceptional Circumstances

Conduct Examined in Civil or Criminal Courts

Normally a disciplinary council is not held to consider conduct being examined by a criminal or civil court until the court has reached a final judgment and until the period of appeal has expired or the appeal has been rejected. However, priesthood leaders should proceed with informal or formal Church discipline when evidence of transgression is available and they have persuasive reasons not to wait.

Criminal charges may or may not necessitate Church discipline. Acts that constitute serious crimes under local law normally would be considered serious transgressions. However, minor offenses under local law, such as traffic violations or unintentional failure to comply with technical government regulations, normally would not. Criminal charges that have serious moral overtones may warrant Church discipline even if a criminal court dismisses these charges for technical reasons. Acts such as fornication, adultery, or abortion are serious transgressions though they may not be crimes under local law.

When a member is convicted of a crime or found guilty in a civil action for fraud or other dishonest or immoral conduct, the judgment of the criminal or civil court is a sufficient basis for holding a Church disciplinary council. A finding of guilt in a court may be considered as evidence of guilt for purposes of Church discipline. Reliable evidence submitted to a court may also be considered in a Church disciplinary council.

To avoid implicating the Church in legal matters to which it is not a party, leaders should avoid testifying in civil or criminal cases reviewing the conduct of members over whom they preside. For specific guidelines, see page 151.

Church leaders should not try to persuade alleged victims or other witnesses either to testify or not to testify in criminal or civil court proceedings.

Notice of Criminal Court Conviction

If a member has been convicted of a crime involving conduct that might threaten the well-being of other persons or of the Church, the presiding officer of the Church disciplinary council should promptly send to the Office of the First Presidency a written statement about the nature of the offense and the sentence imposed by the criminal court, even if a disciplinary council does not impose formal discipline.

Reporting Embezzlement of Church Funds

If a person is disciplined for embezzling Church funds, the presiding officer should report it as outlined on page 139.

Party or Witness Unable to Attend

If a party or essential witness is unable to attend a disciplinary council, the presiding officer invites him to submit a written statement. Such statements may be considered as evidence. When necessary, the party or witness may be questioned further, in writing or orally.

Preserving Evidence

If a witness will not likely be available for a possible future disciplinary council, the presiding officer invites him to write his testimony for use when needed.

Evidence When Adultery Is Charged

If a person who is accused of adultery denies the charge and the matter is being considered in a disciplinary council, revelation requires that "every word shall be established against him or her by two witnesses of the church" (D&C 42:80). "Two witnesses" means two separate sources of evidence. This could include the personal evidence of a participant and some other source of evidence of the member's guilt.

Questions about Procedure

If a bishop is unsure of the procedures to follow in administering Church discipline, he consults his stake president. If a branch president is unsure of procedures, he consults his stake or mission president. A stake or mission president should refer unresolved procedural questions to the Office of the First Presidency.

Questions about Decisions

Local presiding officers should not expect General Authorities to tell them how to decide difficult matters. Decisions on Church discipline are within the discretion and authority of local presiding officers as they prayerfully seek guidance from the Lord.

First Presidency Authority

The First Presidency has ultimate authority over all Church discipline. Decisions of the First Presidency take precedence despite any rules or procedures to the contrary.

Considerations in Church Discipline

The following paragraphs list some of the factors that leaders may need to consider in reaching decisions on formal and informal Church discipline. These factors are listed in order from those that suggest stern discipline to those that suggest more lenient discipline. None of these factors dictates any particular decision. They are only aids to a decision that must be pursued prayerfully and guided by the Spirit of the Lord.

Violation of Covenants

If a transgressor has been endowed, he has made covenants to live a higher standard of behavior than applies to those who have not been endowed. Violating these covenants magnifies the seriousness of the transgression. Therefore, endowed persons who commit adultery or fornication (including homosexual relations) are subject to stern Church discipline.

Adultery is a more serious sexual transgression than fornication because adultery involves a violation of marriage covenants.

Position of Trust or Authority

If a transgressor occupied a position of trust or authority (such as parent, bishop, or teacher) that was violated by the transgression, the seriousness of the transgression is magnified. For example, incest is a most serious form of sexual transgression for a parent because it violates the sacred trust of parental authority. Embezzlement is a most serious form of theft because the transgressor has been trusted with funds; it is a particularly serious offense when it involves Church funds. See also "Serious Transgression While Holding a Prominent Church Position," page 96.

Repetition

If a transgression that was previously confessed and seemingly forsaken is repeated, the repetition may be viewed as part of a pattern of conduct, even though the earlier transgression has been resolved with Church authorities. As the Lord warned those he had forgiven, "Go your ways and sin no more; but unto that soul who sinneth shall the former sins return" (D&C 82:7).

Magnitude

The seriousness of a transgression is measured in part by the number of sinful acts and the number of persons injured. The number of persons who are aware of the transgression also affects its seriousness.

Age, Maturity, and Experience

Presiding officers should consider a transgressor's age, maturity, and experience when administering Church discipline. The Lord revealed, "For of him unto whom much is given much is required; and he who sins against the greater light shall receive the greater condemnation" (D&C 82:3).

Leniency is often appropriate for those who are immature in the gospel. Leniency may also be appropriate for young members who are involved in a moral transgression if they forsake the sin and manifest sincere repentance. However, young members who persist in immoral conduct may require formal disciplinary action.

Interests of the Innocent

When administering and announcing discipline, presiding officers should consider the interests of innocent victims and the transgressor's innocent family members.

Time between Transgression and Confession

If a transgression occurred many years before it was confessed, the presiding officer carefully considers the intervening circumstances. If the sin was not repeated and the member has lived righteously in the interim, his conduct during the intervening time can show that he has forsaken the sin. In this instance, confession may complete rather than start the process of repentance.

Voluntary Confession

Voluntary and complete confession demonstrates a repentant attitude, which may favor leniency. An admission of guilt after a person has been accused of or interviewed about a transgression is less indicative of repentance. A person who admits guilt when interviewed by a bishop shows greater repentance than one who tries to deceive and admits guilt only when confronted with evidence.

Evidence of Repentance

Normally, evidence of repentance is the most important single factor in determining how to accomplish the first purpose of Church discipline: saving the soul of the transgressor. Genuine repentance is demonstrated more reliably by righteous actions over a period of time than by intense sorrow during a single interview. Judgments about the adequacy of repentance require spiritual discernment. Factors to consider include the nature of the confession, depth of sorrow for the sin, success in forsaking the sin, strength of faith in Jesus Christ, faithfulness in obeying other commandments, truthful communications to Church officers, restitution to injured persons, obedience to legal requirements, and willingness to follow the direction of Church authorities.

Fellowshipping

The bishop's role as a common judge does not end when a member has been disciplined. It continues until the person returns to full fellowship and, when necessary, receives a restoration of blessings. Disciplinary action should be the first step on the way back to the full blessings of Church membership. Church leaders and members should be anxious to help a person who has been disciplined to repent so he can enjoy these blessings. The bishop oversees these efforts.

The time just after a person has been disciplined is difficult and critical for the person and his family. During this time, priesthood leaders and other Church members should be patient and sensitive to the needs of those involved and should give special encouragement and assistance. The bishop should interview the person frequently and, if necessary, his spouse.

The bishop sees that mature, caring home teachers and visiting teachers are assigned to a person who has been disfellowshipped or excommunicated and to his immediate family members. In some cases couples may be assigned. Home teachers and visiting teachers should make regular contacts and see that the person, his spouse, and other family members receive the counsel and fellowship they need during this critical period of anguish, repentance, and healing.

If a person who has been disciplined moves from the ward before he has returned to full fellowship and received a restoration of blessings, the bishop informs the person's new bishop of the discipline and what remains to bring the member back to full fellowship and blessings. The bishop makes this same contact for excommunicated persons who have consented to be assisted by Church leaders (see page 101 for guidelines in such situations).

Ending Formal Probation, Disfellowshipment, or Excommunication

Determine Jurisdiction and Participation

To consider ending formal probation, disfellowshipment, or excommunication, a presiding officer where the person currently lives must convene a disciplinary council. The council should have the same (or higher) level of ecclesiastical authority as the council that took the initial disciplinary action. For example:

1. If a bishop presided over the disciplinary council that administered the discipline, the person's current bishop normally presides over another council to consider changing the person's status.
2. If a stake president presided over the disciplinary council, a stake president normally presides over another council to consider changing the person's status.

A bishop needs the approval of the stake president to convene a disciplinary council to consider changing a person's status. In a mission, a branch or district president needs the approval of the mission president to convene such a disciplinary council.

Review the Proceedings of the Initial Council

The current presiding officer reviews the proceedings of the initial disciplinary council. These proceedings are summarized on the Report of Church Disciplinary Action form.

For disfellowshipped or excommunicated persons, the presiding officer requests a copy of the original report from the Office of the First Presidency.

For members on formal probation whose conduct has threatened the well-being of other persons or of the Church, the presiding officer obtains a copy of the report from the Office of the First Presidency. For other members on formal probation, the presiding officer obtains a copy of the report from the presiding officer of the unit where the initial disciplinary action was taken.

Interview the Person

The presiding officer interviews the person thoroughly to determine the strength of his faith in Jesus Christ, the extent of his repentance, and whether the

conditions specified in the initial disciplinary action have been met.

Determine Status of Civil or Criminal Court Action (If Necessary)

If a person who has had Church discipline was convicted of a crime or found guilty in a civil action of fraud or other dishonest or immoral conduct, a disciplinary council should not be held to consider changing his Church status until he has fulfilled all terms and conditions of any sentence imposed by legal authorities. These conditions may include imprisonment, probation, parole, and fines or restitution. Exceptions require the approval of the First Presidency.

Consult with the Presiding Officer Where Action Was Taken (If Necessary)

If the presiding officer has questions or concerns as he reviews the report of the initial disciplinary council, he may consult with the presiding officer of the unit where the council was held to see if he can provide clarification.

When there is an aggrieved victim (such as for incest, child abuse, or spouse abuse) whose circumstances are known by the current presiding officer of the unit where the initial disciplinary action was taken, the disciplined person cannot return to full fellowship or be readmitted by baptism until his current presiding officer has consulted with the current presiding officer of that unit and obtained his opinion on the advisability of the proposed change of status.

Give Notice of the Disciplinary Council

The presiding officer notifies the person of the date, time, and place of the disciplinary council where his change of Church status will be considered so he can attend or submit a written statement if he desires.

Convene and Conduct the Disciplinary Council

The presiding officer convenes and conducts the disciplinary council. The person is invited into the room, the council is opened with prayer, and the presiding officer or someone designated by him states the purpose of the council. The presiding officer then asks the member questions about what he has done to repent and about his commitment to the Church and the strength of his testimony.

In a stake disciplinary council that is convened to consider ending Church discipline, the role of the high council is much the same as outlined on pages 99–100, but it is not necessary for high councilors to draw lots or to speak before the council.

When all relevant matters have been presented, the presiding officer excuses the member and, with his counselors, prayerfully deliberates over what action to take. See page 99 for instructions about these deliberations and about informing the member of the council's decision.

If First Presidency approval is not necessary to end the discipline prescribed in the case, the presiding officer may end it himself. If First Presidency approval is necessary (as outlined below), the conclusion of the council can be only a recommendation to the First Presidency and not a final decision.

Complete and Submit a Report

See page 101.

Apply for First Presidency Approval (If Necessary)

If the person was disfellowshipped or excommunicated for any of the following reasons, the approval of the First Presidency is required before he may be reinstated to full fellowship or readmitted by baptism:

1. Murder (as defined on page 95).
2. Incest (as defined on page 95).
3. Sexual offense against or serious physical abuse of a child by an adult.
4. Apostasy (as defined on pages 95–96).
5. Committing a serious transgression while holding a prominent Church position (as defined on page 96).
6. An elective transsexual operation.
7. Embezzlement of Church funds or property.

In these circumstances, the disciplinary council is conducted as stated previously. No preauthorization from the First Presidency is required. If the disciplinary council recommends a change in status, the presiding officer may notify the person of this recommendation. He should explain that the person's status cannot be changed until the First Presidency gives written approval of the recommendation.

To submit a recommendation to the First Presidency, the presiding officers complete each step on the Application to the First Presidency form. In the United States and Canada, this form is available

from the Office of the First Presidency. In other areas it is available from the Area Presidency.

The stake or mission president sends (1) the completed application form, (2) the Report of Church Disciplinary Action form, and (3) any necessary attachments (such as letters that are required on the application form) to the Office of the First Presidency or to the Area Presidency if the unit is outside the United States and Canada. The Office of the First Presidency will notify the stake or mission president of the decision.

Give Written Notice of the Decision

The presiding officer ensures that after the disciplinary council, the person receives prompt written notice of the decision and its effects, even if he has been advised orally.

Readmitting Excommunicated Persons by Baptism

When all approvals have been received, a person who was excommunicated may be readmitted into the Church by baptism. The bishop prepares a Baptism Record, noting on the form that the baptism is for readmission. After baptism, the person is confirmed a member of the Church and receives the gift of the Holy Ghost as in any other confirmation.

Church Activity after Readmission

Members Who Were Not Previously Endowed. From the time of their baptism, these members may participate in Church activity just as a new convert would.

Members Who Were Previously Endowed. From the time of their baptism until their blessings are restored by a General Authority assigned by the First Presidency, these members may participate in any Church activity that is permissible for an unendowed member who does not hold the priesthood. However, they may not participate in vicarious baptisms for the dead until their blessings are restored.

Ordination after Readmission

Brethren Who Previously Held the Priesthood but Were Not Endowed. After baptism, these brethren are ordained to the priesthood office they previously held.

Brethren Who Previously Held the Priesthood and Were Endowed. See "Restoration of Blessings" on this page.

Temple Recommends after Readmission

See page 67.

Membership Records After Discipline Has Ended

After Formal Probation Has Ended

No change is made to the membership record because formal probation is not recorded on it.

After Disfellowshipment Has Ended

After a person has been reinstated to full fellowship, the administration office removes the notice of disfellowshipment and provides an updated membership record.

After Readmission by Baptism

After a person is readmitted by baptism, the stake president or bishop submits a copy of the Baptism Record, usually with the Report of Church Disciplinary Action.

If the member was not endowed before excommunication, the administration office provides the ward a membership record that shows the member's original baptism and other ordinance dates, with no reference to excommunication.

If the member was endowed before excommunication, the administration office provides the ward a membership record that shows the member's new baptism date and includes the message "Restoration of Blessings Required." After the member's blessings are restored, the administration office provides another updated membership record that shows the member's original baptism and other ordinance dates, including endowment (and current priesthood, if applicable), with no reference to excommunication.

Annotations

Although membership records do not mention formal probation and do not mention disfellowshipment or excommunication after discipline has ended, they may include annotations until the First Presidency authorizes their removal (see page 129).

Restoration of Blessings

Endowed persons who were excommunicated and later readmitted by baptism can receive their priesthood and temple blessings only through the ordinance of restoration of blessings. Such persons are not ordained to priesthood offices or endowed again, since all priesthood and temple blessings held at the time of excommunication are restored through the ordinance. Brethren are restored to their former priesthood office, except the office of bishop or patriarch.

Only the First Presidency can approve the performance of the ordinance of restoration of blessings. The First Presidency will not consider an application for this ordinance sooner than one year after the person is readmitted by baptism.

To submit a recommendation to the First Presidency, the presiding officers complete each step on the Application to the First Presidency form. In the United States and Canada, this form is available from the Office of the First Presidency. In other areas it is available from the Area Presidency.

The stake or mission president sends the completed application form and any necessary attachments (such as letters that are required on the form) to the Office of the First Presidency or to the Area Presidency if the unit is outside the United States and Canada. The Office of the First Presidency will notify the stake or mission president of the decision.

Performance of the Ordinance

If the First Presidency authorizes the restoration of blessings, a General Authority is assigned to interview the applicant. If the applicant is found worthy, the General Authority performs the ordinance to restore the person's blessings.

For the Dead

See pages 76–77.

Retention of Records

The presiding officer should destroy copies of paper and electronic records relating to a disciplinary action after the ward receives an updated membership record or other notification of action on the record. If a council has taken no action or imposed formal probation on a member whose conduct is not threatening, the presiding officer retains these records until the matter is resolved.

The presiding officer should destroy copies of records relating to the submission of an Application to the First Presidency form after he receives notification that Church headquarters has received the application.

14. Records and Reports

For units in the United States and Canada, the term *administration office* in this section refers to Church headquarters in Salt Lake City.

For units outside the United States and Canada, the term *administration office* refers to the Presiding Bishopric administration office or service center that serves the unit.

Purposes of Church Record Keeping

The Lord places great importance on record keeping in the Church. One of the first commandments He gave Joseph Smith when the Church was organized was, "There shall be a record kept among you" (D&C 21:1). Keeping records has been a commandment in all dispensations, and this important work continues in our time.

Accurate records help leaders get to know members and identify their needs. For example, records can help leaders identify who may need special care in becoming more active in the Church or becoming worthy of temple blessings. Accurate records also help leaders evaluate progress in accomplishing the mission of the Church. This evaluation can help leaders make plans for improvement.

These purposes of record keeping are similar to the purposes that Moroni suggested: "And after they had been received unto baptism, and were wrought upon and cleansed by the power of the Holy Ghost, they were numbered among the people of the church of Christ; and their names were taken, that they might be remembered and nourished by the good word of God" (Moroni 6:4).

Another important purpose of record keeping in the Church is to maintain a record of the saving ordinances that each person receives.

Leaders should provide instruction on how to use Church records to help accomplish the purposes outlined above.

Types of Records

The following types of records are kept in Church units:

Member progress reports. These include information about meeting attendance, visits to members, activity and priesthood office of new converts, and temple recommend status of endowed members (see pages 126–27).

Membership records. These include names and addresses and information about birth, parentage, and ordinances for each member (see pages 127–31).

Historical records. These include information about officers who are serving, accomplishments, challenges, faith-building experiences, and other notable events (see page 131).

Financial records. These include information about tithes and other offerings and costs for activities and supplies (see pages 133–40).

Stake Record-Keeping Leadership

Stake President

The stake president oversees stake record keeping. He may assign his counselors and clerks to do much of this work under his direction.

The stake president ensures that stake clerks and stake and ward leaders are taught their record-keeping responsibilities. He also ensures that they follow Church policies and procedures in completing their assignments.

The stake president oversees stake clerks in preparing records and reports. He meets with the clerks to review these materials; to ensure that they are accurate, complete, and on time; and to sign those that require his signature. A counselor may review and sign reports in the stake president's absence.

The stake president assigns clerks to follow up on all audit concerns within 30 days of the audit.

The stake president oversees the preparation of the annual stake historical summary (see page 131). He also ensures that people who have access to records and reports protect the privacy of individuals (see pages 131–32).

Stake Clerk

A stake clerk is called as outlined on page 9. The stake president may assign him responsibilities such as those outlined below. Assistant stake clerks may help.

Stake Record-Keeping Responsibilities

The stake clerk provides administrative support to the stake presidency. He records minutes of stake leadership meetings. He also reminds the stake presi-

dency of items that need follow-up or further consideration.

The stake clerk prepares stake records and reports. These include the Member Progress Report (see page 126), financial records (see pages 133–40), and membership information. He ensures that records and reports are accurate, complete, and on time.

The stake clerk meets with the stake president to review records and reports. He provides information from these materials to help leaders identify (1) the needs of members and organizations; (2) the availability of resources, such as finances and priesthood strength; and (3) trends, strengths, and weaknesses.

The stake clerk should become familiar with the record-keeping programs on Church computer systems where they are available.

The stake clerk may design and print boundary models to use in proposing realignment of stake and ward boundaries. He also may complete forms for proposed boundary changes.

When a new ward is created or a bishop is released, the stake clerk oversees the transfer of ward records, correspondence, and accounts. He also submits information to the administration office when there is a change in stake president, stake president's counselor, bishop, or patriarch.

The stake clerk prepares the Officers Sustained form for the first stake conference of each year and for the annual historical summary. He also ensures that certificates for Melchizedek Priesthood ordination are prepared and distributed properly.

The stake clerk helps the stake president record information for stake disciplinary councils (see pages 99, 101).

Review of Ward Records

The stake clerk reviews ward records and reports to ensure that they are accurate and complete. He resolves record-keeping problems before giving reports to the stake president. He works directly with ward clerks to resolve minor problems. He discusses serious problems with the stake president or, at his request, the bishop.

The stake clerk meets with each ward clerk twice each year to ensure that (1) membership records are updated promptly and accurately and (2) certificates of blessing, baptism and confirmation, and priesthood ordination are given to ward members.

Record-Keeping Instruction

As requested by the stake president or a bishop, the stake clerk instructs assistant stake clerks, ward clerks, and assistant ward clerks. This instruction is especially important when clerks are newly called, when a Church record-keeping program is introduced or updated, and when records are not completed properly. He should instruct new ward clerks within 30 days of when they are called.

The stake clerk also may help priesthood and auxiliary leaders instruct secretaries.

Record-keeping instruction can be given individually and during priesthood leadership meetings, ward conferences, and other times as necessary.

When instructing clerks or secretaries, the stake clerk helps them understand how information from records and reports can help leaders.

The stake clerk ensures that other clerks and secretaries obtain the materials they need to fulfill their responsibilities.

Audits

The stake clerk should be aware of audit reports. He works with ward clerks and assistant clerks to ensure that membership and financial record-keeping problems are resolved. For information about audits of membership records, see the Stake/District Audit of Membership Records form. For information about audits of Church finances, see pages 139–40.

Stake Historical Records

The stake president may assign the stake clerk, an assistant stake clerk, or a stake history specialist to prepare the annual Stake and District Historical Summary (see page 131).

Assistant Stake Clerks

Assistant stake clerks may be called as outlined on page 9. The stake presidency may assign these clerks to each part of stake record keeping, such as financial records, member progress reporting, and historical records. They work under the direction of the stake presidency and the stake clerk.

The stake president assigns an assistant stake clerk to become familiar with Church-published resource materials and know how to order them from distribution centers. This clerk also should know how to

order garments and temple clothing. He instructs clerks who have similar responsibilities in wards. He also coordinates efforts to help stake members be informed about these materials and know how to obtain them.

Ward Record-Keeping Leadership

Bishop

The bishop oversees ward record keeping. He may assign his counselors and clerks to do much of this work under his direction.

The bishop ensures that ward clerks and quorum, group, and auxiliary leaders are taught their record-keeping responsibilities. He also ensures that they follow Church policies and procedures in fulfilling these responsibilities.

The bishop oversees ward clerks in preparing records and reports. He meets with the clerks to review these materials; to ensure that they are accurate, complete, and on time; and to sign those that require his signature. A counselor may review and sign reports in the bishop's absence.

The bishop ensures that people who have access to records and reports protect the privacy of individuals (see pages 131–32).

Ward Clerk

A ward clerk is called as outlined on page 17. The bishop may assign him responsibilities such as those outlined below. Assistant ward clerks may help.

Ward Record-Keeping Responsibilities

The ward clerk provides administrative support to the bishopric. He records minutes of ward leadership meetings. He also reminds the bishopric of items that need follow-up or further consideration.

The ward clerk prepares ward records and reports. These include the Member Progress Report (see page 126), financial records (see pages 133–40), and membership records (see pages 127–31). He ensures that records and reports are accurate, complete, and on time.

The ward clerk meets regularly with the bishop to review records and reports. He provides information from these materials to help leaders identify (1) the needs of members and organizations; (2) the availability of resources, such as finances and priesthood strength; and (3) trends, strengths, and weaknesses.

When compiling the Member Progress Report, the ward clerk reviews information submitted by ward organizations to ensure that it is accurate and complete. He resolves record-keeping problems before giving the report to the bishop. He works directly with secretaries to resolve minor problems. He discusses serious problems with the bishop or, at his request, the organization leader.

The ward clerk should become familiar with the record-keeping programs on Church computer systems where they are available. He also provides membership directories, lists, and rolls received from the administration office or produced by the Member Information System (MIS) software to the bishopric, to other priesthood leaders, and to auxiliary leaders.

The ward clerk prepares the Officers Sustained form for ward conference. He also ensures that certificates of blessing, baptism and confirmation, and priesthood ordination are given to ward members.

The ward clerk helps the bishop record information for ward disciplinary councils (see pages 99, 101).

Record-Keeping Instruction

The ward clerk coordinates record-keeping instruction for assistant ward clerks and for quorum, group, and auxiliary secretaries. He ensures that they receive instruction when they are newly called, when a Church record-keeping program is introduced or updated, and when records are not completed properly.

When instructing assistant clerks or secretaries, the ward clerk helps them understand how information from records and reports can help leaders.

The ward clerk ensures that assistant clerks and secretaries have the materials they need to fulfill their responsibilities.

Assistant Ward Clerks

Assistant ward clerks may be called as outlined on page 17. The bishopric may assign these clerks to each part of ward record keeping, such as financial and membership records. They work under the direction of the bishopric and the ward clerk.

The bishop assigns an assistant ward clerk to become familiar with Church-published resource materials and know how to order them from distribution centers. This clerk also should know how to order garments and temple clothing. He coordinates efforts to help ward members be informed about these materials and know how to obtain them.

Priesthood and Auxiliary Leaders

Priesthood and auxiliary leaders oversee record keeping in their organizations. They may assign secretaries to do much of this work under their direction. They meet regularly with secretaries to ensure that records are accurate, complete, and on time.

Priesthood and Auxiliary Secretaries

See pages 166, 182, 197–98, 217, 232, and 242 in *Book 2*.

Member Progress Reporting

Member progress reporting consists of weekly, monthly, and quarterly information that helps leaders focus on the progress and needs of members. All members of record (as defined on page 127) are included in member progress reporting.

Components of Member Progress Reporting

Attendance Rolls

See pages 170, 189–90, 207, 226, 238, and 244 in *Book 2*.

Home Teaching and Visiting Teaching Reports

See pages 170 and 207 in *Book 2*.

Member Progress Report—Stake/District

Under the direction of the stake president, the stake clerk prepares the Member Progress Report—Stake/District each quarter. Instructions are on the form.

The stake president reviews the report for accuracy, signs it, and makes sure the clerk submits it to the administration office by the 30th of the month following the end of the quarter.

Member Progress Report—Ward/Branch

Under the direction of the bishop, the ward clerk prepares the Member Progress Report—Ward/Branch each month. Instructions are on the form.

The bishop reviews the report for accuracy, signs it, and makes sure the clerk submits it to the stake by the 15th of each month.

Membership Lists

Membership lists provide important supplemental information to member progress reporting. These lists are produced by the administration office or by ward computers. They include information about members who are of age for ordinances. They also identify young men of missionary age. In addition, the lists identify which men hold the Melchizedek Priesthood and which members are endowed. Lists for the bishopric's youth interviews are also available.

Using the Information

Leaders should serve and nurture all members, but member progress reporting can help identify which individuals and families need the most care. Every number and statistic in member progress reporting represents an individual member who has unique needs. Leaders should seek direction from the Lord as they consider whom to reach out to and what help to provide.

Using information from member progress reporting, leaders can identify attendance patterns that help them focus attention on those who need help and those who are most likely to respond to activation efforts.

Information from member progress reporting also helps leaders determine which members are missed regularly by home teachers or visiting teachers. Leaders can then take steps to make sure these members are visited.

Member progress reporting can help leaders identify which members should be considered for priesthood ordinances and full-time missionary service. It also helps leaders determine which recent adult male converts have not been ordained and which adult converts did not attend priesthood or Relief Society meetings during the month. With this information, leaders can plan how to help members prepare to receive ordinances and how to encourage attendance.

Member progress reporting also helps leaders focus attention on endowed members who do not have current temple recommends.

Percentages are not part of member progress reporting, but they may be computed to show trends, such as whether activity is increasing or decreasing. They should not be used to compare one ward with another, one quorum with another, or one person with another. Ward and individual circumstances are unique.

When monitoring attendance, leaders should consider that some members may be on Church assignments outside the ward. Other members may be required to work on Sunday or may be away for vacations and other reasons. Leaders also should keep

in mind members who are ill, members who are confined to their homes or to health-care facilities, and members who are giving care on Sunday to those who are confined.

Membership Records

Membership records include members' names and addresses, as well as ordinance and other vital information. The ward should have a membership record for each member living within the ward boundaries. Membership records are to be kept in the ward in which the member lives. Exceptions, which should be few, require the consent of the bishops and stake presidents involved and the approval of the Office of the First Presidency.

Membership records are the only means of recording ordinances and actions in the permanent records of the Church. Therefore, the bishop makes sure that clerks keep accurate records and send updated information promptly to the administration office. It is especially important to record ordinance information, promptly request records of members who move into the ward, and promptly transfer records of members who move from the ward.

Occasionally members should review their own membership records and those of dependent children living at home, but only with a clerk or the bishop. Members may not have copies of membership records. However, they may request copies of their Individual Ordinance Summary for personal use in areas where the First Presidency has authorized the summary. Under no circumstances may membership records be given to anyone other than the bishop or a clerk.

The administration office provides handbooks or other detailed instructions for creating and updating membership records. Some general principles are outlined in the following paragraphs.

Names Used in Church Records

A person's full proper name, not initials or a nickname, should be used on membership records and ordinance certificates.

Members of Record

For statistical and reporting purposes, the following individuals are members of record. Each of them should have a membership record:

1. Those who have been baptized *and* confirmed.
2. Those under age nine who have been blessed but not baptized.
3. Those who are not accountable because of mental disabilities, regardless of age.
4. Unblessed children under age eight when *(a)* at least one parent is a member of the Church and *(b)* both parents give permission for a record to be created. This includes children of converts.

After a person is baptized, the administration office sends a record of baptism to the unit. After a person is confirmed, the administration office sends a new or updated membership record to the unit.

A person age nine or older who has a membership record but has not been baptized and confirmed is not considered a member of record. However, the bishop keeps the membership record until the person is 18. At that time if the person chooses not to be baptized despite being given every opportunity, the bishop, with written permission from the stake president, cancels the membership record. However, records of unbaptized members who are considered not accountable because of mental disabilities are not canceled.

Records of New Ward Members

When membership records are received in a ward and when converts are baptized and confirmed, a member of the bishopric introduces and welcomes the new members in the next sacrament meeting. He reads each person's name, invites the person to stand, and asks members of the congregation to show by the uplifted hand that they accept the members in full fellowship in the ward. Records of family members are read together. If a member knows any reason why a person may not be entitled to full fellowship, he or she should talk to the bishop privately.

After children who are members of record are baptized and confirmed, a member of the bishopric announces each child's baptism and confirmation in sacrament meeting. These children are not presented for acceptance into the ward because they are already members.

The ward clerk or an assistant ward clerk meets with new ward members soon after they arrive to review their membership records for accuracy.

Records of Members Who Move or Are Temporarily Away from Home

Ward leaders, home teachers, or clerks obtain the forwarding addresses of members as soon as they become aware that members intend to move. Leaders of the new ward should contact members as soon as possible after they move in.

If a clerk cannot find out where members have moved, he sends the membership records to the administration office, where efforts to locate the members will continue.

When a person moves from a ward for more than three months, a clerk normally moves the membership record to the new ward. As an exception, the record is not moved if the member intends to return after leaving for temporary seasonal or employment purposes that may last longer than three months.

When a person moves from the ward for less than three months and intends to return, the membership record is kept in the home ward. The home ward also maintains the member's financial records.

If local leaders are uncertain about where a membership record should be (such as for a member in prison), they should keep the record in the ward that can best meet the member's needs.

Records of Members Serving outside Their Home Ward

Mission and Temple Presidents

The membership records of mission and temple presidents and their wives should stay in their home ward unless their children accompany them in the assignment. If children accompany them, the records should be sent to the ward where they live during the assignment. Financial contributions and tithing declarations should be made to the ward where the membership records are located.

Other Church Assignments

If members have Church assignments outside their home ward but live in their home ward, their membership and financial records are kept in the home ward. If assignments require members to move from their home ward for three months or more, and if their children accompany them, their membership records are moved to the new ward.

Full-Time Missionaries

See page 87.

Records of Members in Hospitals or Homes for the Aged

The records of members who live in hospitals or homes for the aged and infirm are kept in the ward that can best serve them. In most cases this is the ward where the hospital or home is located. Ward leaders make sure these members receive the full program of the Church to the extent possible.

Records of Members in Military Service

When a member enters military service for training, the membership record is kept in the home ward until the member is assigned to a more long-term duty station. At that time, the member should contact the home ward and provide the name and address of the new ward so a clerk can move the membership record.

If a member is at sea for an extended time, is deployed in a war zone, or is not within the boundaries of a stake or mission, the membership record is usually kept in the ward that supports the duty station.

Records of Members Who Do Not Have a Permanent Address

Members who travel extensively and do not have a permanent address should consult with the bishop at their place of primary residence and designate a home ward. That ward keeps the membership records, and ward leaders should maintain contact with the members. Financial contributions and tithing declarations should be made to that ward.

Records of Members Who Have Mental Disabilities

If the bishop determines that a person who is at least eight years old is not accountable, he instructs a clerk to write *Not Accountable* under the heading for baptism on the person's membership record (see also pages 26–27). The clerk sends the record to the administration office for updating. The record should not be canceled.

Records of Members Who Have Hearing Impairments

Members who use sign language and their families may choose to have their Church membership records in one of the following places: (1) their home ward, (2) a designated host ward within a geographic area to which a group for the hearing impaired is assigned, or (3) a ward or branch organized for members who are hearing impaired.

Records of Adopted Children

Records of adopted children and their adoptive parents may be created or updated only after the adoption is final. The name on the membership record should conform to the decree of adoption.

Records of Babies Who Were Born out of Wedlock

See page 25.

Records of Children of Divorced Parents

If a child's parents are divorced, his or her legal name, as defined by local law or custom, should be recorded on the membership record and the certificate.

Records with Special Comments

The bishop and a clerk review the records of new ward members for special comments that the administration office may have added. When records include such comments, the bishop contacts the administration office as needed and takes appropriate action.

Records with Annotations

In areas where the First Presidency has given authorization, an annotation may be placed on the record of a member whose conduct has threatened the well-being of other persons or of the Church. An annotation helps the bishop protect Church members and others from such individuals. When a bishop receives an annotated membership record, he should follow the instructions in the annotation.

Church headquarters will automatically annotate a person's membership record when the stake president or bishop:

1. Submits a Report of Church Disciplinary Action showing that the person was disciplined for incest, sexual offense against or serious physical abuse of a child, plural marriage, an elective transsexual operation, repeated homosexual activities (by adults), or embezzlement of Church funds or property.
2. Submits written notification that the person has been criminally convicted for one of these transgressions.

Church headquarters also will automatically annotate a person's membership record when the stake president and bishop jointly submit written notification that the person has committed one of these transgressions before or after excommunication or name removal. In addition, the stake president and bishop may jointly recommend that a person's membership record be annotated for other conduct that threatens the well-being of other persons or of the Church.

In all cases, annotation of membership records is removed only with First Presidency approval upon request of the stake president.

Requests for Contact on Membership Records

If a member moves and the bishop feels a need to share information with the member's new bishop, he completes a Request for Contact form and sends it with the membership record. When a bishop receives a record that is accompanied by one of these forms, he should contact the previous bishop as soon as feasible. After the contact, the bishop should destroy the Request for Contact form.

Move Restrictions on Membership Records

If a member moves while Church disciplinary action or another serious concern is pending, the bishop or another authorized priesthood leader may contact the administration office and ask for a move restriction on the membership record. A move restriction may also be requested in cases of welfare abuse.

A record that has a move restriction will not be moved to a new unit until the priesthood leader who requested the restriction authorizes it to be removed.

Recording and Correcting Ordinance Information

Instructions for recording and correcting ordinance information on membership records are provided on pages 24–25, 26, 29, and 33.

Preparing Certificates for Ordinances and Blessings

Priesthood leaders ensure that certificates are prepared and distributed as soon as possible after the blessing of a child, baptism and confirmation, and priesthood ordination. These certificates are a member's only Church source for the names of those who performed the ordinance or blessing. Leaders encourage members to safeguard these certificates, explaining that they may be irreplaceable if they are lost or destroyed.

Recording and Correcting Civil Information

Civil information (name, date of birth, marriage information, date of divorce, and places where these events occurred) is recorded on membership records. If this information has been recorded incorrectly, a member may ask the bishop to have it corrected. If official documents are available, a bishop may want to review them to verify the accuracy of a requested correction.

Special Situations

For special situations that are not addressed in this section, such as records for common law marriages, leaders should see membership records instructions or contact the administration office.

Removing Names from Church Membership Records

An adult member who wishes to have his or her name removed from the membership records of the Church must send the bishop a written, signed request (not a form letter). A request that Church representatives not visit a member is not sufficient to initiate this action.

The bishop makes sure that a member who requests name removal understands the consequences: it cancels the effects of baptism and confirmation, withdraws the priesthood held by a male member, and revokes temple blessings. The bishop also explains that a person can be readmitted to the Church by baptism only after a thorough interview (see "Readmission after Name Removal" on this page).

If the bishop is satisfied that the member understands these consequences and is not likely to be dissuaded, he completes a Report of Administrative Action form and forwards it to the stake president. The bishop forwards the member's written request and membership record with the form.

If members of the stake presidency concur after reviewing the matter, they ask the bishop to send the member a letter stating that his or her name is being removed from the records of the Church as requested. The letter should state the consequences of name removal. It also should state that the request for name removal can be rescinded only if the member sends the stake president a written request for recision within 30 days (the stake president's name and address should be included). If the stake president does not receive such a request, he submits the completed Report of Administrative Action form and other documents requested on the form. Instructions for submittal are on the form. The person's name is then removed from the membership records of the Church.

A minor who wishes to have his or her name removed from the records of the Church must follow the same procedure as an adult with one exception: the written request must be signed by the minor (if over the age of eight) and by the parent, parents, or guardians who have legal custody of the minor.

If two or more family members want their names removed from the records of the Church, they need to prepare only one written request.

If a member requesting name removal threatens legal action against the Church or Church leaders, the stake president should follow the instructions on page 151.

Name Removal and Church Discipline

If a member requests name removal and a bishop or stake president has evidence of transgression that warrants convening a disciplinary council, he should not act on the request until Church discipline has been imposed or he has concluded that no disciplinary council will be held. Name removal should not be used as a substitute for or alternative to Church discipline.

If a member requests name removal and a bishop or stake president suspects transgression but lacks sufficient evidence to convene a disciplinary council, the request for name removal may be approved. Any evidence of unresolved transgressions should be noted on the Report of Administrative Action form so priesthood leaders may resolve such matters if the individual applies for readmission into the Church.

Effects of Name Removal on Temple Sealings

See pages 74 and 76.

Announcement of Name Removal

In some cases a bishop may need to announce that a person's name has been removed from the membership records of the Church. The announcement merely states that the action was taken at the person's request. The announcement should not use the word *excommunication*. The guidelines under "Announcement of the Decision" on pages 100–101 apply.

Readmission after Name Removal

After name removal, a person must be baptized to be readmitted into the Church. When a person requests readmission, the bishop or stake president requests a copy of the Report of Administrative Action form that accompanied the request for name removal. This copy is available from the Office of the First Presidency. After reviewing the form, the bishop interviews the person thoroughly. He inquires about the reasons for the name removal request and the

desire for readmission. He also determines whether any unresolved transgressions may have been committed before or after name removal.

If the person was on formal probation or was disfellowshipped at the time of name removal, a disciplinary council is held to consider the request for readmission.

If the bishop finds that before name removal the person committed transgressions that warranted disciplinary action but were not resolved, he should not approve a request for readmission until he is satisfied that the person has repented of those and any subsequent transgressions. No disciplinary council is held.

If the person committed any of the transgressions listed under "Apply for First Presidency Approval" (see page 105), either before or after name removal, the approval of the First Presidency is required for readmission. If the person is readmitted after committing any of the transgressions listed under "Records with Annotations" (see page 129), either before or after name removal, an annotation will be made on the new membership record.

A person who requests readmission must meet the same qualifications as others who are baptized (see the Baptism Record book). When the bishop is satisfied that the person is worthy and sincere in wanting to be readmitted, he prepares a Baptism Record, noting on the form that the baptism is for readmission. After baptism, the person is confirmed a member of the Church and receives the gift of the Holy Ghost. The confirmation may be performed during the baptismal service or during a sacrament meeting.

Priesthood ordination, temple recommends, membership records, and the ordinance of restoration of blessings are handled the same as for an excommunicated person who has been readmitted by baptism (see pages 106–7).

Historical Records

Each year the stake president oversees the stake clerk, an assistant stake clerk, or a stake history specialist in preparing the Stake and District Historical Summary. The person who prepares the summary gathers information concerning noteworthy events, accomplishments, and spiritual experiences from stake priesthood and auxiliary leaders, the stake mission, and wards. When preparing the summary, the person should provide enough detail to give a clear understanding of events and their effect on those who are involved.

The Officers Sustained forms from the stake and each ward should be included in the historical summary. The completed summary should be submitted at the end of the year as indicated on the form.

Confidentiality of Records

Church records are confidential. These include membership records, financial records, minutes of meetings, official forms and documents (including records of disciplinary councils), and notes made from private interviews. These records may exist on paper, computer, or diskette.

Leaders and clerks are to safeguard Church records by handling, storing, and disposing of them in a way that protects the privacy of individuals. Leaders ensure that information that is gathered from members is (1) limited to what the Church requires and (2) used only for approved Church purposes.

Leaders give information from Church records and reports only to those who are authorized to use it. Leaders ensure that it is not used for personal, political, or commercial purposes. Information from Church records, including historical information, may not be given to individuals or agencies conducting research or surveys.

Membership directories that are distributed to members should include only name, address, and telephone information. Membership lists that have more information, such as age and membership status, may be given only to authorized stake and ward leaders.

For additional guidelines, see "Records Management" below.

Records Management

Stake and ward leaders should make effective records management a part of their record-keeping procedures. Three important areas of records management are outlined in the following paragraphs.

Protection

All information should be protected against unauthorized access, change, destruction, or disclosure. Church records, reports, and backup copies of computer software programs and data should be kept in a safe place. Highly sensitive records, including computer printouts and disks, should be kept in a locked drawer or cabinet in the leader's office when they are not being used.

To protect confidential membership and financial information on computers, leaders should use the password features of Church record-keeping systems. Passwords should be written down and kept in locked files away from the computer. They should be changed when leaders and clerks are released. If members use stake and ward computers for family history work, they should not have access to membership or financial information.

Retention

Records should be kept only as long as they are needed for administrative and legal purposes. Leaders who have specific questions about how long to keep records should consult record-keeping instructions or the administration office.

Disposition

Records that are outdated or no longer needed should be destroyed in such a way that the information cannot be retrieved or reconstructed. Membership diskettes should be destroyed rather than erased and used for other purposes.

Records that have potential historical value should not be discarded, destroyed, or placed in the meetinghouse library. Questions about the historical value of records may be addressed to:

Historical Department (Archives Division)
Floor 2EW
50 East North Temple Street
Salt Lake City, UT 84150-3800
Telephone: 1-801-240-1702

EXHIBIT 7

GENERAL HANDBOOK OF INSTRUCTIONS

Published by
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Temple president, counselors, recorder

Stake president, counselors, high councilors, stake executive secretary, stake clerk

Bishop, counselors, ward executive secretary, ward clerk

Mission president, counselors, mission executive secretary, mission clerk

District president, counselors, district councilors, district executive secretary, district clerk

Branch president, counselors, branch executive secretary, branch clerk

This handbook has been prepared solely for use by General and local Church officers in administering the affairs of the Church. Its contents may not be duplicated. When a Church officer who has a copy of the handbook is released, he is to transfer the copy promptly to his successor or to his presiding authority.

MISSION APPLICATION

Mission and district presidents and branch presidents in missions are to follow the instructions in this handbook as far as they are applicable. Each mission president determines whether any modification to the instructions is necessary in his mission after consulting and as directed by his Area Presidency.

Foreword

This handbook has been prepared to guide priesthood officers so "that they themselves may be prepared, and that my people may be taught more perfectly, . . . and know more perfectly concerning their duty, and the things which I require at their hands" (D&C 105:10).

This edition supersedes previous editions of the *General Handbook of Instructions;* they should be discarded.

Detailed instructions regarding priesthood, auxiliary, and other Church programs are included in organizational handbooks and other administrative publications. The *General Handbook of Instructions* refers extensively to these publications. Local leaders should be sure that current copies of these publications are available to them.

The *Bulletin* contains supplemental instructions. Correspondence from the First Presidency contains changes in policy and procedure. When the instructions in this handbook are changed, leaders should mark the change in their copies and should include the date and source of the change. Leaders should keep this handbook and issues of the *Bulletin* together in a loose-leaf binder. They should direct any questions concerning handbook instructions to the presiding authority in their area.

Officers of the Church should be familiar with the instructions in this handbook. Beyond these instructions, they should seek the guidance of the Holy Spirit earnestly for direction as they serve the Lord in their callings.

"Wherefore, now let every man learn his duty, and to act in the office in which he is appointed, in all diligence" (D&C 107:99).

The First Presidency

9. Records and Reports

RESPONSIBILITY FOR RECORDS

The stake president is responsible for all stake records and reports, and the bishop is responsible for all ward records and reports (see section 1). They delegate the record keeping to the stake or ward clerk.

Records that stakes and wards keep include activity, financial, historical, and membership records. Financial records and reports are discussed in section 10 of this handbook. The other records and reports are discussed in this section.

This handbook outlines only general policies and procedures for keeping Church records. The instruction booklets and the record-keeping forms referenced in this section contain specific instructions.

USING RECORDS AND REPORTS

To keep current and accurate records and reports, priesthood and auxiliary leaders should make sure the clerk or secretary receives the right instruction booklet and is trained. Other clerks or qualified persons can help with the training.

Stake and ward clerks should have the following booklets; they contain detailed instructions for preparing records and reports.

1. *Stake and Ward Clerks' Handbook*
2. *Church Activity Records*
3. *Church Financial Records*
4. *Church Membership Records*

Priesthood and auxiliary organization secretaries should have *The Secretary's Guide.*

Priesthood and auxiliary leaders should interview clerks or secretaries regularly to give direction and review progress.

When enough priesthood holders are available to serve, the stake president and bishop may call an assistant clerk for each of the record-keeping areas.

Stake and ward leaders should make sure their records and reports are accurate and should use them to monitor stake or ward progress. Their accuracy will affect the management of the stake or ward.

Clerks or secretaries should help leaders study and use the information provided by records and reports.

Local leaders need to know what records and reports exist and how they can use them to help in their administrative duties. The following paragraphs list Church records and reports and suggest how to use them.

ACTIVITY RECORDS

Activity records provide local leaders with information about member activity. Local leaders can use these records to see how many people are participating in ward and stake meetings and programs and to make plans for increased participation. Summaries of these reports are sent to Church headquarters.

Activity records include the Action Report, Home Teaching/Visiting Teaching Record, Attendance Roll, Organization Activity Report, Ward/Branch Activity Report, and Stake/District Activity Report.

The Action Report, Home Teaching/Visiting Teaching Record, and the Ward and Stake Activity Reports are designed to be used by leaders. The forms contain instructions for using these records and reports.

Detailed instructions for preparing activity records and reports are included in the booklets *Church Activity Records* and *The Secretary's Guide*.

HISTORICAL RECORDS

The Historical Record provides an official history of each stake and ward. Historical records include Officers Sustained, Historical Events, Changes of Officers, Arrival and Departure of Missionaries (missions only), and Organization Historical Events.

Detailed instructions for preparing historical records and reports are with the Historical Record.

MEMBERSHIP RECORDS

Membership records show where members reside and contain current ordinance and other vital information. Records in the membership category include the Membership Record, Membership Statistical Worksheet, membership printouts, Ordinance and Action Record, Stake/District Ordinance and Action Statistical Report, Ward/Branch Ordinance and Action Statistical Report, Address Locator, and Member Identification.

MEMBERSHIP RECORD POLICIES

Membership records must be kept up-to-date because they provide the authorization for priesthood leaders to allow members to participate fully in Church programs.

Every ward should have a membership record for each Church member living within the ward boundaries. Membership records must be kept in the ward in which the member lives. Exceptions, which should be few, are to be approved by the Office of the First Presidency.

When a member moves for three months or more but intends to return, the clerk should move his membership record to the temporary address.

Wards using manual records should prepare a pink membership record as the temporary copy.

Clerks should keep membership records in a confidential file in the meetinghouse where the bishop can use them. Individuals who need information from the membership record for their Church calling may obtain it only from the bishop. A member may review his own membership record, and those of his dependent children living at home, with the clerk or bishop. Under *no* circumstances should membership records be given to auxiliary leaders or secretaries. Bishops and clerks may not release information from membership records except as noted in this paragraph.

Members of Record

All individuals in the following four categories are called *members of record* and should have a membership record:

1. Those who have been baptized.
2. Those who have been blessed but not yet baptized, including those who are not accountable.
3. Unblessed and unbaptized children under nine, when *both* parents are members of the Church or when one is a member and one is a nonmember, if the parents give permission for a record to be created for the children.
4. Unblessed children under eight when their parents are converts and give permission for the record to be created.

Individuals in categories 2, 3, and 4 are called *unbaptized members of record*. When they reach the age of eight, the bishop should make sure they have every opportunity to accept the gospel and be baptized into the Church. Bishops keep these persons' membership records until they reach the age of nine. At that time, if everything possible has been done to prepare them for baptism but they choose not to be baptized, clerks are to mark the membership records *Canceled—and not baptized*. (This does not apply to unbaptized members who are considered not accountable; their records should not be canceled.) Clerks then send the canceled records to the Member and Statistical Records Division or to the area office.

For statistical and reporting purposes, Church membership includes those who are baptized and those under nine for whom a membership record has been prepared but who are not baptized.

Records of Youth Away from Home

When a youth moves away from home, his new bishop should contact him within two weeks after he arrives in the new ward. The ward he moves from should write on his record that he is a youth moving away from home and should send it to the Member and Statistical Records Division or to the area office. Then Church headquarters or the area office will process the record quickly and send a letter to the new bishop telling him that a youth has moved into his ward.

The bishop should give the Member Identification form to single young adults under twenty-five who are leaving home to seek employment, to attend school, or to enter military service. The youth-away-from-home program is explained in *Church Membership Records* and in instructions on the Member Identification form.

Member Lamanite children in the Indian student placement program are considered temporarily away from home. Clerks should handle their membership records like students' records.

Member Identification

Bishoprics may call members moving into a ward to Church positions when they bring with them a current temple recommend or a Member Identification form, or when their membership records arrive in the ward.

Members Serving Outside Their Home Ward

The instructions in this section apply to members who are serving temporarily away from their home ward on temple assignments, missions, or leadership assignments.

If members move from their home ward and will stay at the new ward for more than one year, their new ward is responsible for their contributions, temple recommends, and membership records. Mission presidents are exceptions to this policy. They may choose to make their financial contributions either to the home ward or to the away-from-home ward. They should make a tithing settlement in the ward where they are making their contributions.

For full-time missionaries—

1. The mission president interviews them for temple recommends.
2. The home ward accepts their financial contributions (except fast offerings), holds tithing settlement, and keeps their membership records.
3. The home ward does not need to keep reports of their activity. Church headquarters will take care of those records.

If members have assignments outside their home ward, but still live in their home ward, the home ward is responsible for their contributions, temple recommends, and membership records.

Members in Hospitals or Homes for the Aged

Local leaders should keep the records of members confined to, or living in, hospitals or homes for the aged and infirm in the ward that can best serve the interests of the members. This usually is the ward in which the hospital or the home is located. The ward leaders should make sure these members receive the full program of the Church to the extent possible.

Members in Prison

The ward welfare services committee coordinates services for members in prison. Local leaders should

place these members' records in the ward that can best serve their interests. This usually is the ward in which members of their immediate family live. Bishops who have questions concerning membership records for prisoners should contact the Member and Statistical Records Division.

Members Traveling

Members who travel for an extended time and who are in any one ward only for short time periods should designate a "home ward." The "home ward" will retain the membership records and the ward leaders will maintain contact with these members.

Children Born Out of Wedlock

When a child is born out of wedlock and a membership record is to be created, the clerk should contact the Member and Statistical Records Division or area office for instructions on creating the record.

Adopted Children

When a child is adopted, the clerk is to create or update membership records according to instructions in the booklet *Church Membership Records*. The clerk does not note on any record that a child was adopted.

Request for Contact

When a member who is being counseled by his bishop, or who may not be worthy of such privileges as receiving fast-offering assistance, moves from the ward, the bishop should complete a red tag Request for Contact and attach it to the membership record.

The bishop receiving the membership record with a Request for Contact on it should contact the member's prior bishop immediately to discuss the member's status. After he makes this contact, he should remove the tag from the membership record.

Presenting Membership Records in Sacrament Meeting

When converts are baptized and confirmed, and when members move into a ward, a member of the bishopric presents their membership records in sacrament meeting. A clerk should not present the membership records.

The bishopric should present membership records as soon as possible after new members' records arrive and should encourage the members to attend the sacrament meeting in which their records will be presented to the ward. The one conducting the meeting invites the new members to stand when their names are read and asks the congregation to vote to receive these new members into fellowship in the ward. If a ward member knows any reason why they are not entitled to full fellowship in the ward, he should tell the bishop privately.

The clerk should meet with new members soon after they arrive and review their membership records with them for accuracy.

When a child who is a member of record is baptized and confirmed, his record is not presented for acceptance into the ward because he is already a part of the ward. However, the one conducting the meeting should announce the child's baptism and confirmation.

Changing Ordinance Information

The complete date and the name of the person performing the ordinance should be recorded on the membership record. However, an ordinance is valid if at least the year of the ordinance and the name of the person performing the ordinance is recorded on the membership record. An ordinance is also valid if the complete date (day, month, year) is recorded.

If ordinance information is missing from a membership record or needs to be changed, the bishop must see proof of the ordinance before changing the record. The member should show the bishop original certificates issued at the time the ordinance was performed.

If the member requesting the change cannot provide certificates, the ward clerk can request a search of Church historical records. The clerk should prepare the form Request for Ordinance Information according to instructions on the form.

If the information cannot be found on records in the Historical Department, the member or clerk should obtain the written testimony of two witnesses. The two witnesses should—

1. Have been ten years of age or older when the event occurred.
2. Have seen and heard the event.
3. Be members of record at the time their testimony is given.

The testimony of the witnesses must be in writing and must be signed in the presence of a member of a bishopric or higher Church authority. If the testimony of witnesses cannot be obtained, the ordinance must be performed again to be valid. If a member received ordinances after he received an invalid ordinance, his bishop or stake president must send a letter to the First Presidency seeking reconfirmation and ratification of his later ordinances.

Changing Civil Information

If a member wishes to change any civil information on his membership record (his name; date of birth, marriage, divorce; or place where these events occurred), he must show the bishop official records or documents before the membership record can be changed.

Records of Divided and Discontinued Units

When a stake or ward is divided or discontinued, the clerk should take care of records according to instructions in the clerk instruction booklets.

Detailed instructions for handling membership records are in the booklet *Church Membership Records*.

BRANCH RECORD

A branch that is using the basic Church program, as outlined in the *Branch Guidebook*, uses only the Branch Record. The branch president needs no other record-keeping forms or instructions.

STORING CHURCH RECORDS

Where possible, local leaders should keep all Church records in the meetinghouse. This practice decreases the danger of losing or damaging records and ensures that they are available when audits are conducted and when priesthood leaders need to refer to them.